



# **2013 North Carolina Visitor Profile**

**A publication of the North Carolina Division of  
Tourism, Film & Sports Development**

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## **2013 North Carolina Visitor Profile**

The North Carolina Division of Tourism, Film and Sports Development has contracted with the research company TNS for eight years to perform demographic profiles and volume analyses on the North Carolina travel and tourism industry. TNS is the world's largest provider of custom research and analysis, serving all segments of the travel industry. The company has over 13,000 full-time employees worldwide and offices in more than 80 countries.

The research program, titled "TravelsAmerica" conducts over 10,000 Internet-based interviews among past 12-month travelers who have traveled more than 50 miles from their homes (excluding commuters). From this sample, past-month data from 4,500 – 5,500 past month travelers is also collected for even greater insights. Information collected includes: purpose of trip, mode of travel, travel party characteristics, places visited, number of nights, accommodations, activities, spending, and demographics. Data collected are weighted to match US Census variables, market size, age of household head, household income, and household size.

The purpose of this report is to profile the average North Carolina visitor, both overnight visitors and daytrippers. At the end of the report, an appendix offers definitions of key travel terms.

# 2013 North Carolina Visitor Profile

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## 2013 North Carolina Visitor Profile

### Summary

- ◆ In 2013, approximately 52.5 million person-trips were taken in North Carolina, an increase of nearly sixteen percent from 2012. North Carolina ranked #6 in the US in terms of domestic visitation.
- ◆ Seventy-nine percent of all domestic visitors came to North Carolina for pleasure purposes, while thirteen percent of visitors came to conduct business (includes meeting/convention). The remaining eight percent indicated “other” reason for visiting the state. In terms of overnight visitors to the state, eighty-one percent of domestic visitors came to North Carolina for pleasure purposes, while twelve percent traveled for business purposes. Seven percent visited the state for “other” purposes.
- ◆ The summer (June - August) was the most popular season for travel to North Carolina, with thirty-two percent of all 2013 visitors. Fall (September - November) and spring (March-May) and followed with twenty-five percent and twenty-three percent, respectively. The winter season (December-February) was the least visited with twenty percent. July was the single largest month for travel to the state with nearly fourteen (13.6%) percent, followed by August with nearly ten percent (9.5%).
- ◆ Forty-five percent of North Carolina overnight visitors lodged in a hotel/motel, while forty-one percent stayed in a private home. Nine percent stayed in a rental home or condo, while five percent stayed in a personal second home or condo.
- ◆ The average travel party size for all North Carolina visitor parties was 1.9. Twenty-four percent of travel parties to the state included children in the party.
- ◆ Eighty-seven percent of all travelers to the state drove (includes personal automobile, rental, motorcycle and RV), while eight percent traveled by air.
- ◆ In 2013, the average household trip expenditure by visitors to North Carolina was \$389. The average household trip expenditure for overnight visitors was \$517. Daytrip parties to the state spent approximately \$134 per visit.
- ◆ The top states of origin of *total* visitors to North Carolina were in-state residents (39.8%), South Carolina (10.2%), Florida (6.7%), Virginia (5.6%), Georgia (5.5%), and Pennsylvania (3.8%).
- ◆ Twenty-two percent of the households that traveled to North Carolina in 2013 had a household income over \$100,000.
- ◆ In 2013, Raleigh/Durham/Fayetteville (15.2%) was the top advertising market of origin for *all* travelers to the state, followed by Charlotte (12.2%), Greensboro/High Point/Winston Salem (8.6%), Greenville-Spartanburg-Asheville (6.0%), Atlanta (4.6%), Greenville-New Bern-Washington (4.9%), New York (3.2%) Washington, DC (3.1%), and Wilmington (2.8%).

## 2013 North Carolina Overnight Visitor Profile

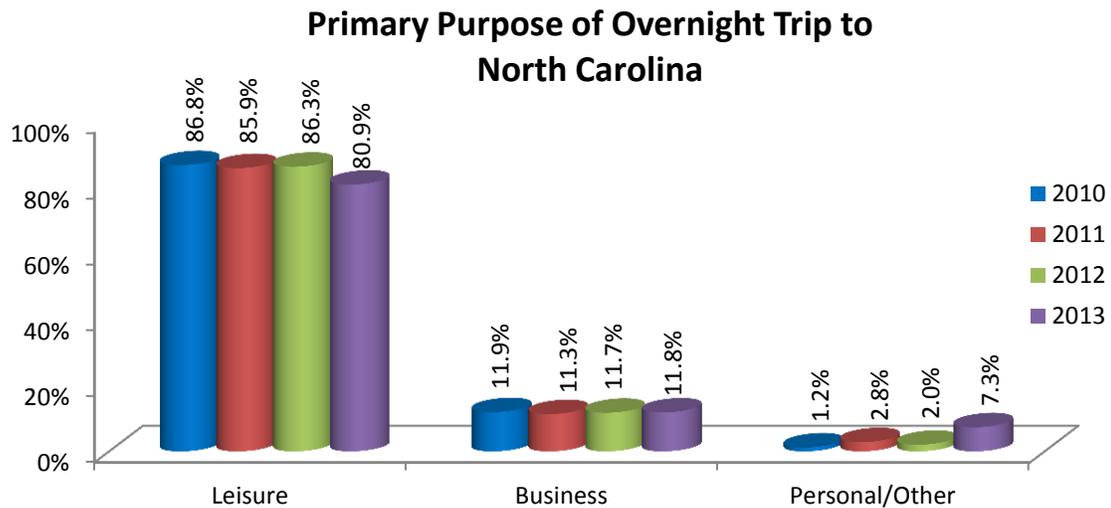
### Summary

- ◆ In 2013, approximately 37.7 million overnight person-trips were taken in North Carolina, up 7.9% from 2012. North Carolina ranked #6 in the US in terms of domestic overnight visitation.
- ◆ Eighty-one percent of all domestic overnight visitors came to North Carolina for leisure purposes, while twelve percent of visitors came to conduct business (includes meeting/convention). The remaining seven percent indicated “other” reason for visiting the state.
- ◆ The summer (June - August) was the most popular season for overnight travel to North Carolina, with thirty-five percent of all 2013 overnight visitors. Fall (September - November) and spring (March-May) followed with twenty-four percent and twenty-three percent, respectively. The winter season (December-February) was the least visited with eighteen percent. July was the single largest month for travel to the state with fourteen percent.
- ◆ Overnight visitors to North Carolina spent an average of 2.7 nights in the state in 2013.
- ◆ Forty-five percent of North Carolina visitors lodged in a hotel/motel, while forty-one percent stayed in a private home. Nine percent stayed in a rental home or condo, while five percent stayed in a personal second home or condo.
- ◆ The average travel party size for all overnight North Carolina visitor parties was 1.9 people. Twenty-three percent of overnight travel parties to the state included children in the party.
- ◆ Eighty-six percent of overnight travelers to the state drove (includes personal automobile, rental, motorcycle and RV), while nearly eleven percent (10.6%) traveled by air.
- ◆ In 2013, the average household trip expenditure for overnight visitors was \$517. Resident overnight visitors spent an average of \$387 and out-of-state overnight visitors spent an average of \$574.
- ◆ The top states of origin of *overnight* visitors to North Carolina were in-state residents (30.4%), South Carolina (8.4%), Florida (7.5%), Virginia (7.1%), Georgia (6.6%), and Pennsylvania (4.7%).
- ◆ Fifty-seven percent of the households that traveled overnight to North Carolina in 2013 had a household income over \$50,000, and nearly a quarter (22%) of them had an income of over \$100,000.
- ◆ In 2013, Raleigh/Durham/Fayetteville (13.0%) was the top advertising market of origin for *overnight* travelers to the state, followed by Charlotte (9.0%), Greensboro/High Point/Winston Salem (6.3%), Atlanta (5.3%), Greenville-Spartanburg-Asheville (4.5%), New York (4.2%), Washington, DC (4.0%) and Greenville-New Bern-Washington (3.5%).

## North Carolina Overnight Visitor Profile

### Main Purpose of Visit

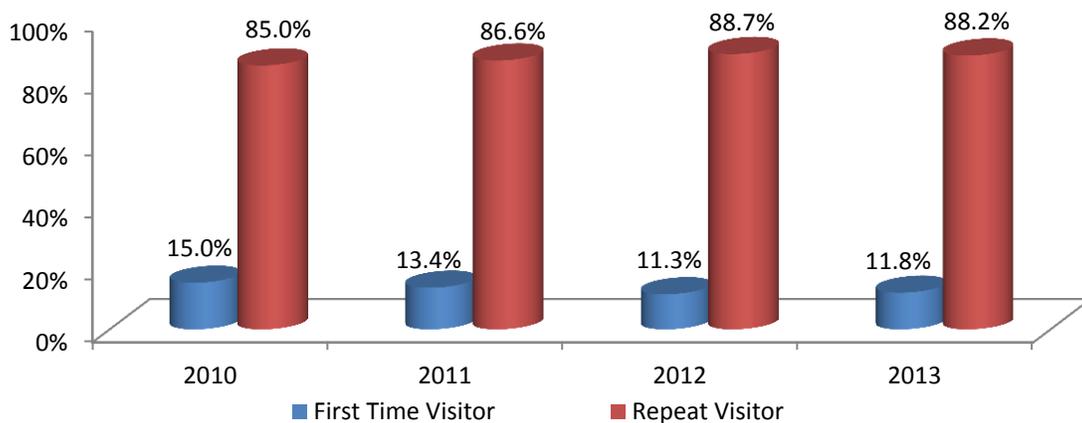
In 2013, eight out of ten (80.9%) of domestic overnight visitors came to North Carolina for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Nearly twelve percent (11.8%) of domestic overnight visitors came for general business, convention, seminar or other group meeting, while seven percent traveled to the state to conduct personal or “other” business.



### First Time Visitors

In 2013, twelve percent of overnight visitors were first time visitors to the state. More than two-thirds have visited more than three times in the last 5 years.

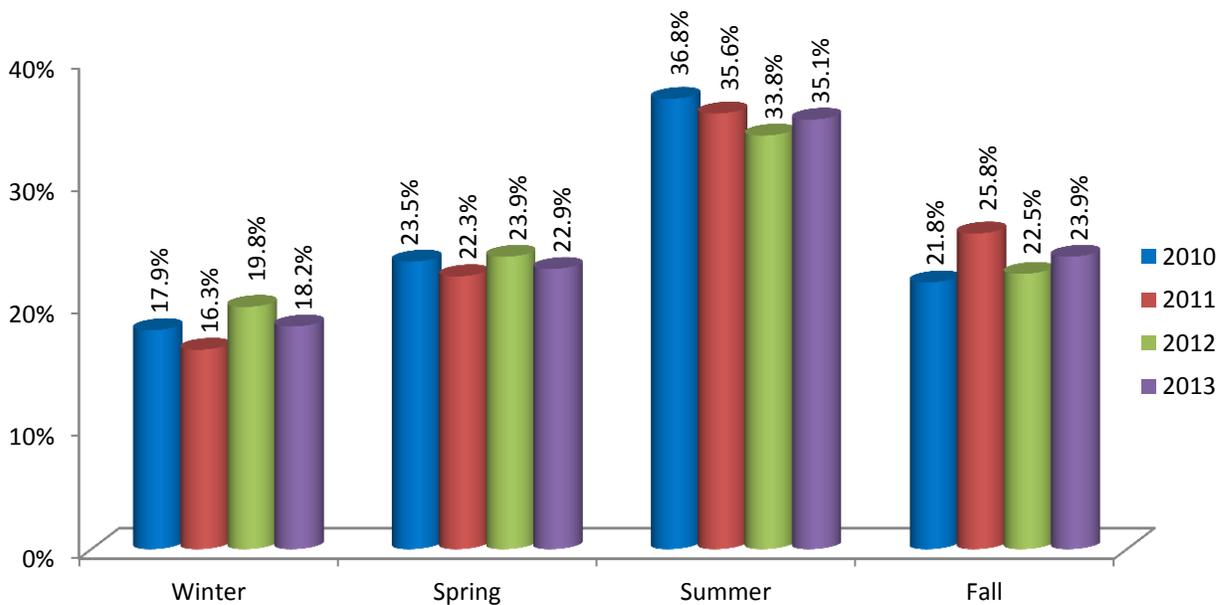
### First Time Overnight Visitors to North Carolina



### Travel Volume by Season

When examining overnight visitation based on the typical seasonal schedule, the summer (June through August) with thirty-five percent was the most popular season of the year for overnight travel to North Carolina (up from thirty-four percent in 2012). Fall (September through November) was the next most popular travel season (23.9%) followed closely by spring (March through May) with nearly twenty-three percent of overnight visitors. Winter (December through February) fell slightly in overall proportion from twenty percent in 2012, but still welcomed over eighteen percent of all overnight visitors last year.

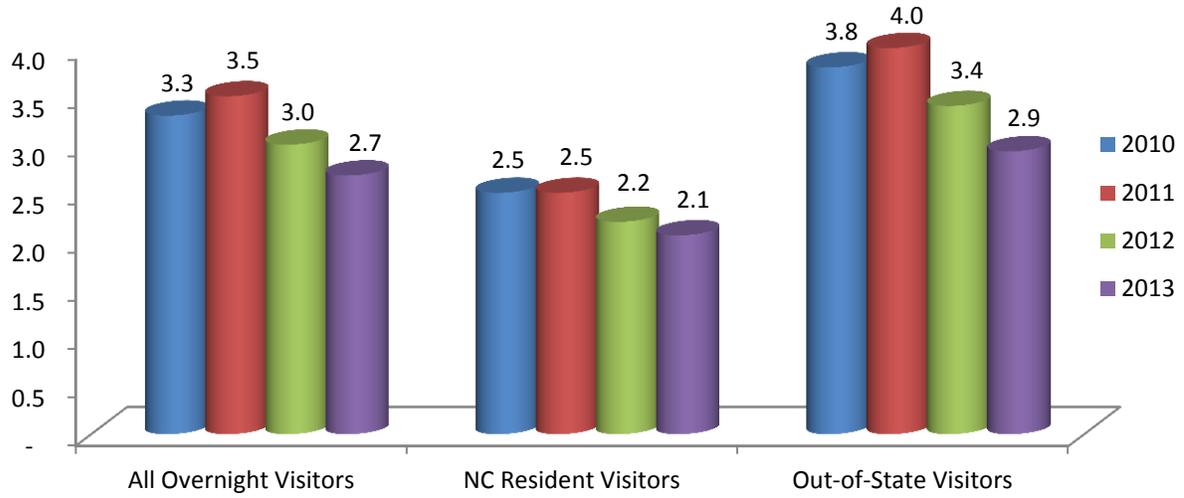
Overnight Travel by Season to North Carolina



### Average Length of Stay

In 2013, an average of 2.7 nights was spent by overnight visitors to North Carolina. This was down from an average of 3.0 in 2012. Length of stay has been slowly decreasing over the last several years, indicating a trend of more frequent, yet shorter visits. Increased overnight visitor volumes over the same time period confirm the trend.

**Average Length of Stay for Overnight Visitors to North Carolina**



### Travel Party Size

The average travel party size for all North Carolina overnight visitors was 1.9 people, the same as in 2012.

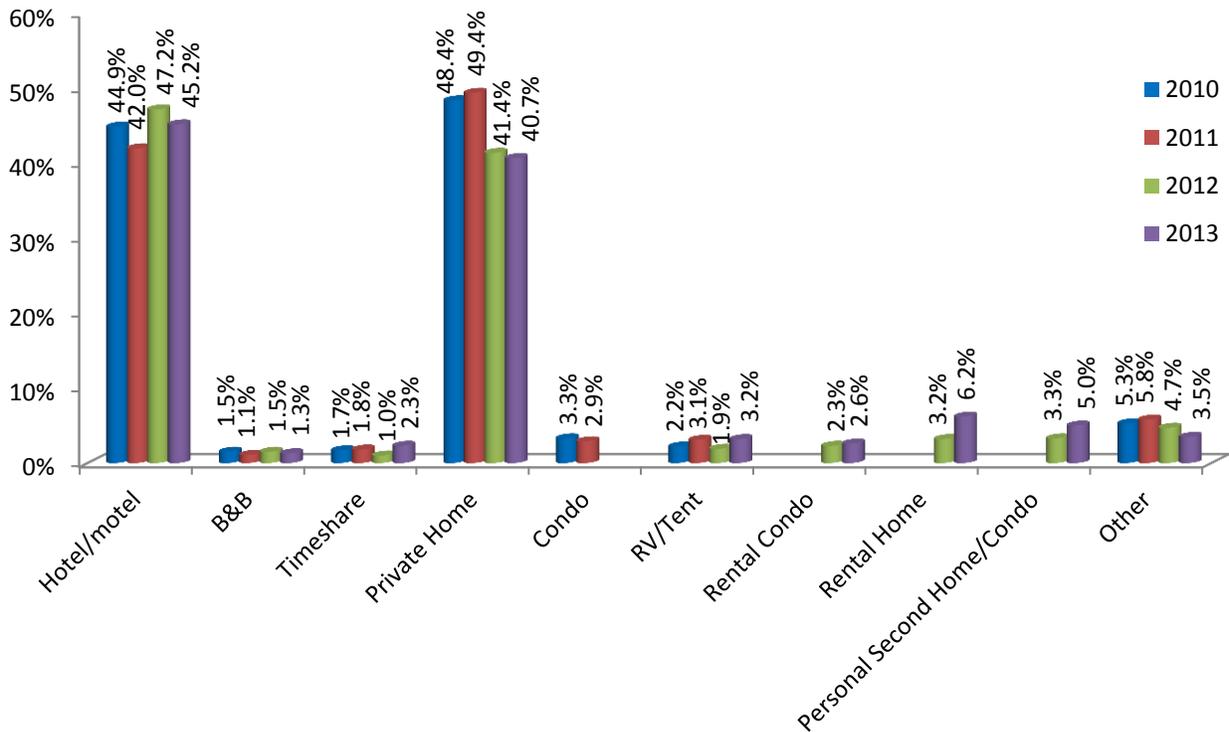
### Children on Trip

Twenty-three percent of overnight visitor parties to North Carolina included children, down just slightly from twenty-four percent in 2012. Among those who traveled with children, the average number of children on trips was 1.8.

### Lodging Used in North Carolina

In 2013, forty-five percent of North Carolina visitors lodged in a hotel/motel. Forty-one percent stayed in a private home. Note that in 2012 the lodging categories changed to better reflect the use of rental homes/condos and personal second homes/condos, therefore comparisons between these categories before 2012 should be made with caution. Nearly nine percent of overnight visitors in 2013 stayed in a rental condo or rental home while in North Carolina.

Lodging by Overnight Visitors to North Carolina

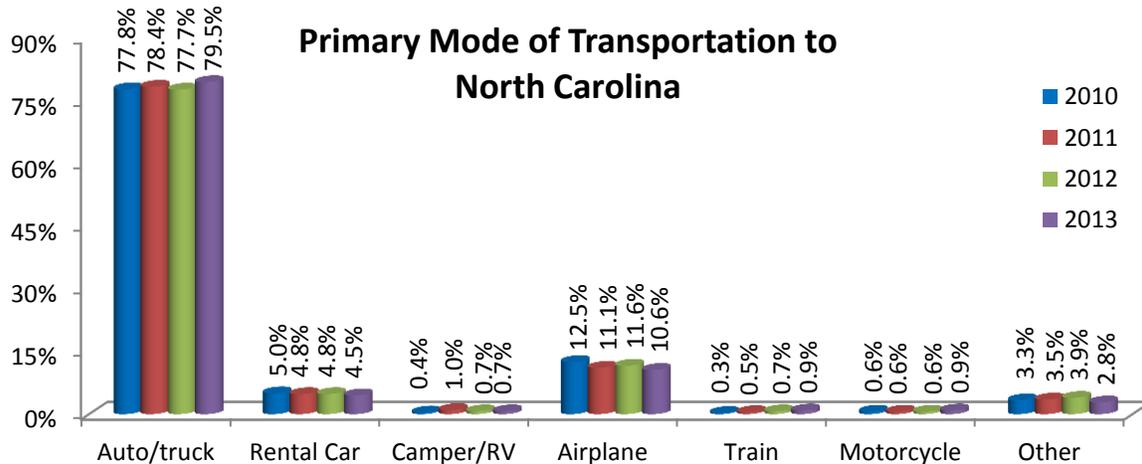


\*percentages add to more than 100% due to multiple responses

\*\*Note that categories changed in 2012 to better reflect the use of rental homes/condos and second homes.

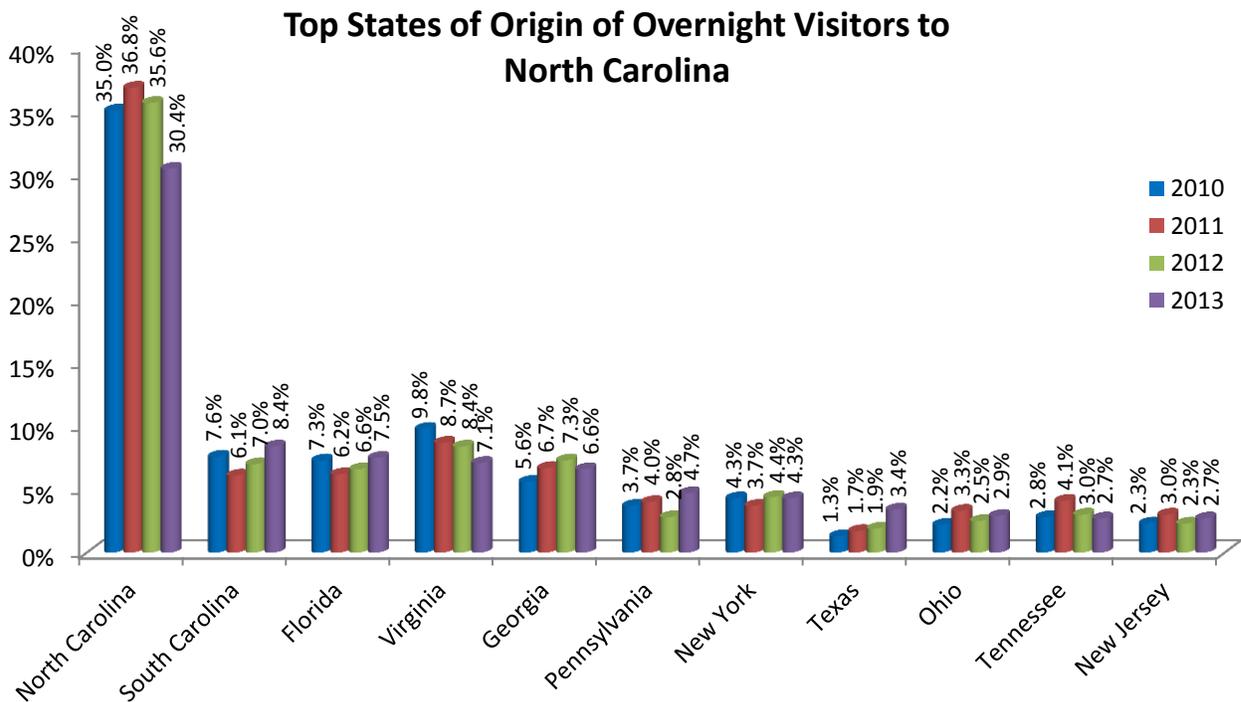
### Mode of Transportation

In 2013, the personal auto was by far the dominant form of transportation (79.5%) to the state, while more than ten percent traveled by air.



### Origin of Visitors

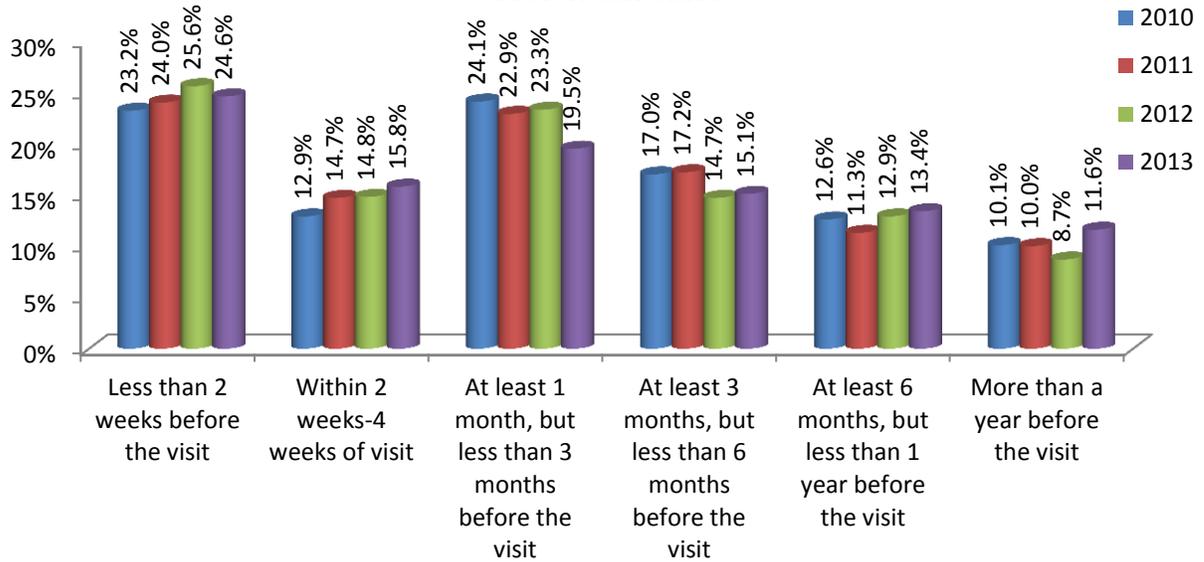
In 2013, the top states of origin for North Carolina overnight visitors included North Carolina (30.4%), South Carolina (8.4%), Florida (7.5%), Virginia (7.1%), Georgia (6.6%), Pennsylvania (4.7%) and New York (4.3%). Visitation share growth from South Carolina, Florida and Pennsylvania showed double-digit increases in 2013.



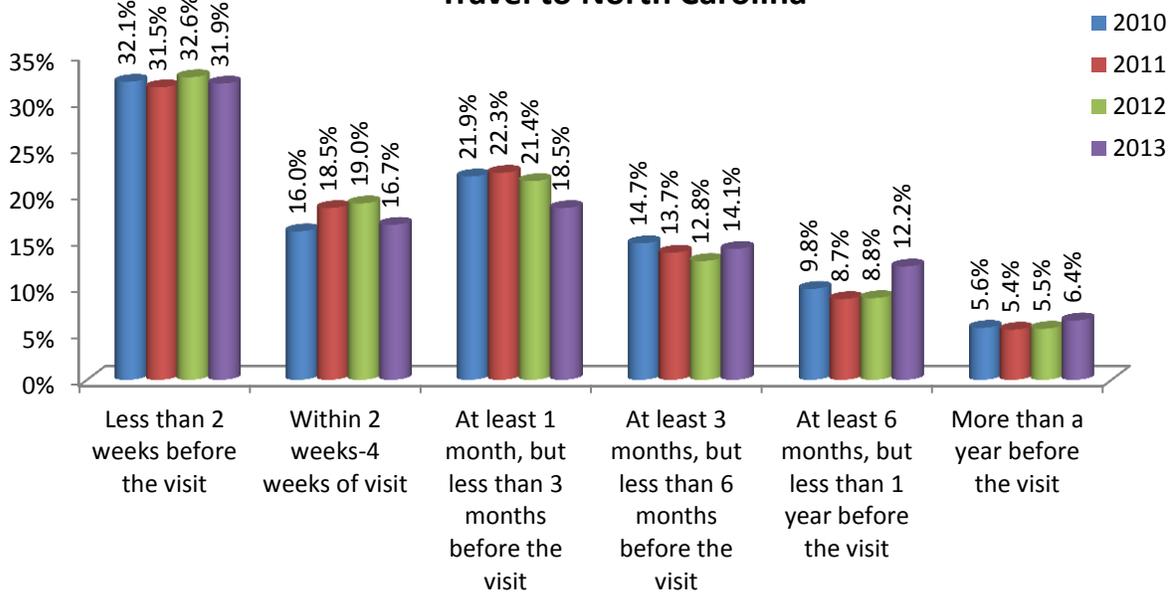
### Trip Planning

One-quarter of 2013 overnight visitors considered North Carolina for a visit at least six months before the visit. The same proportion only began considering a North Carolina visit 2 weeks prior to the visit. More than eighteen percent of overnight visitors made the decision to visit the state at least six months prior to the visit, while thirty-two percent of overnight visitors made the decision within two weeks of visiting.

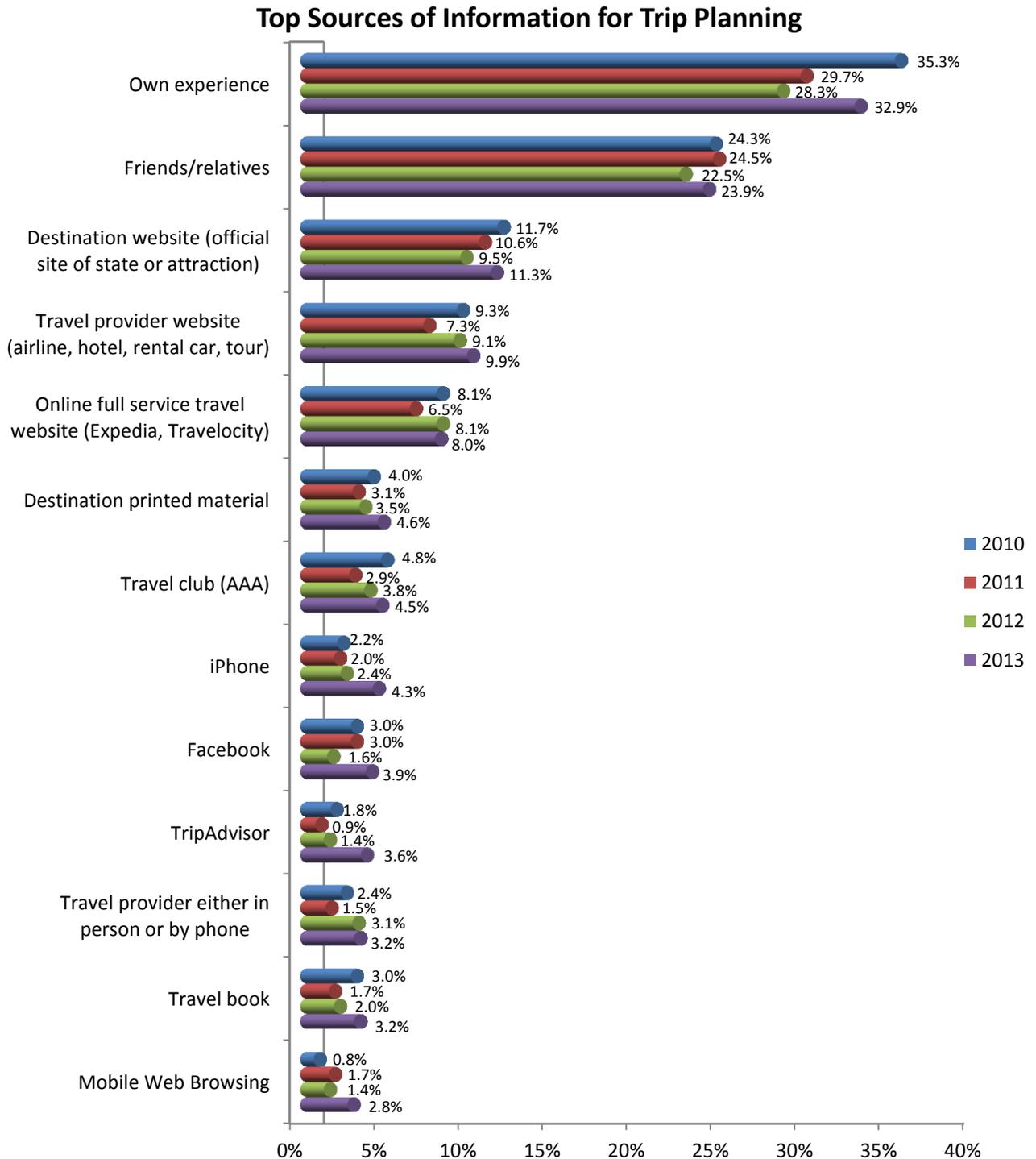
**How Far in Advance Overnight Visitors Considered Travel to North Carolina**



**How Far in Advance Overnight Visitors Made the Decision to Travel to North Carolina**

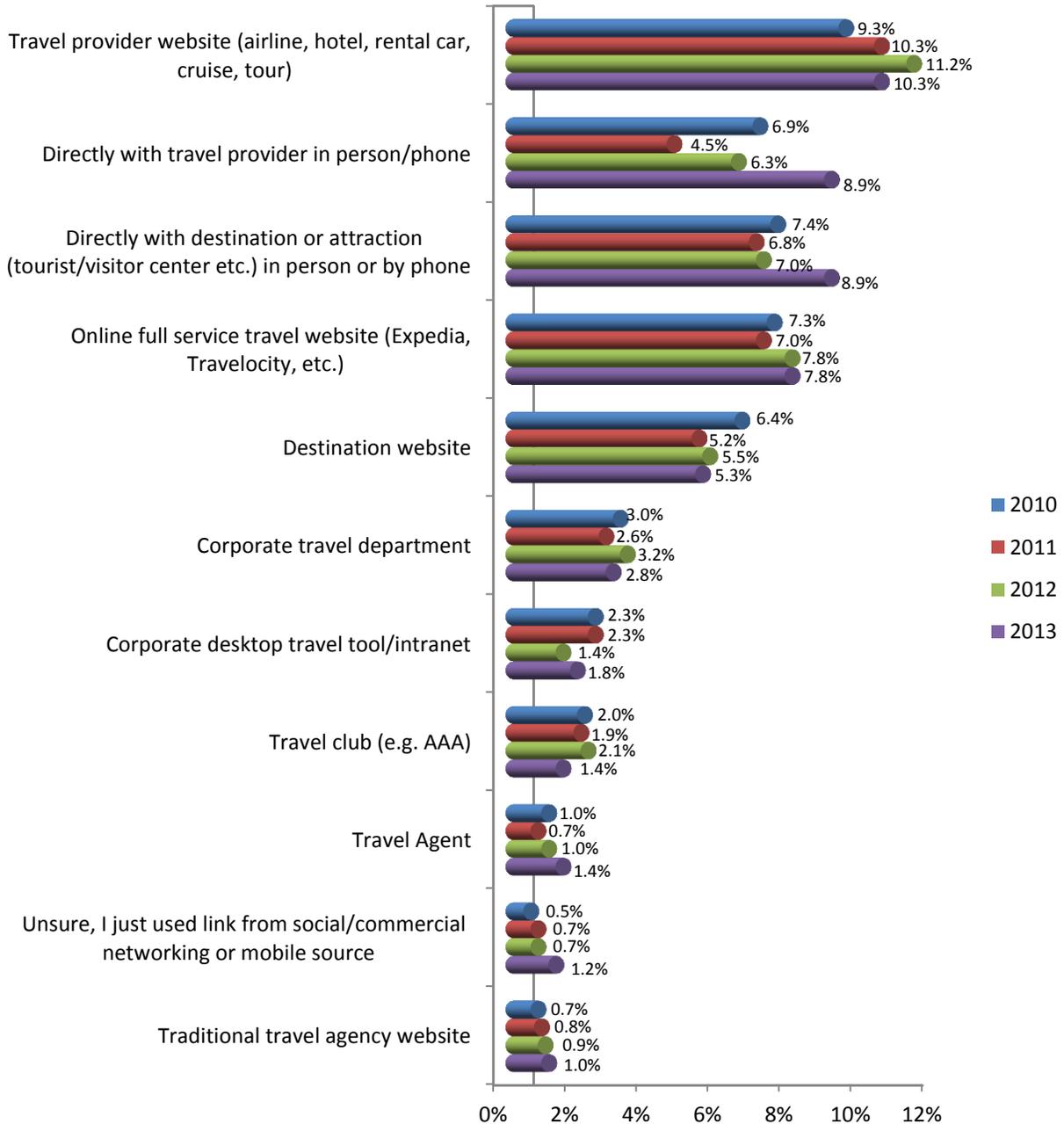


More overnight visitors to North Carolina in 2013 used destination websites, travel provider websites, Facebook and mobile web browsing to plan trips than in 2012. The top sources of information remain personal experience and friends/relatives.



Top methods of booking travel for North Carolina overnight visitors are directly with the travel provides, either through website, phone or in person, and directly with the destination.

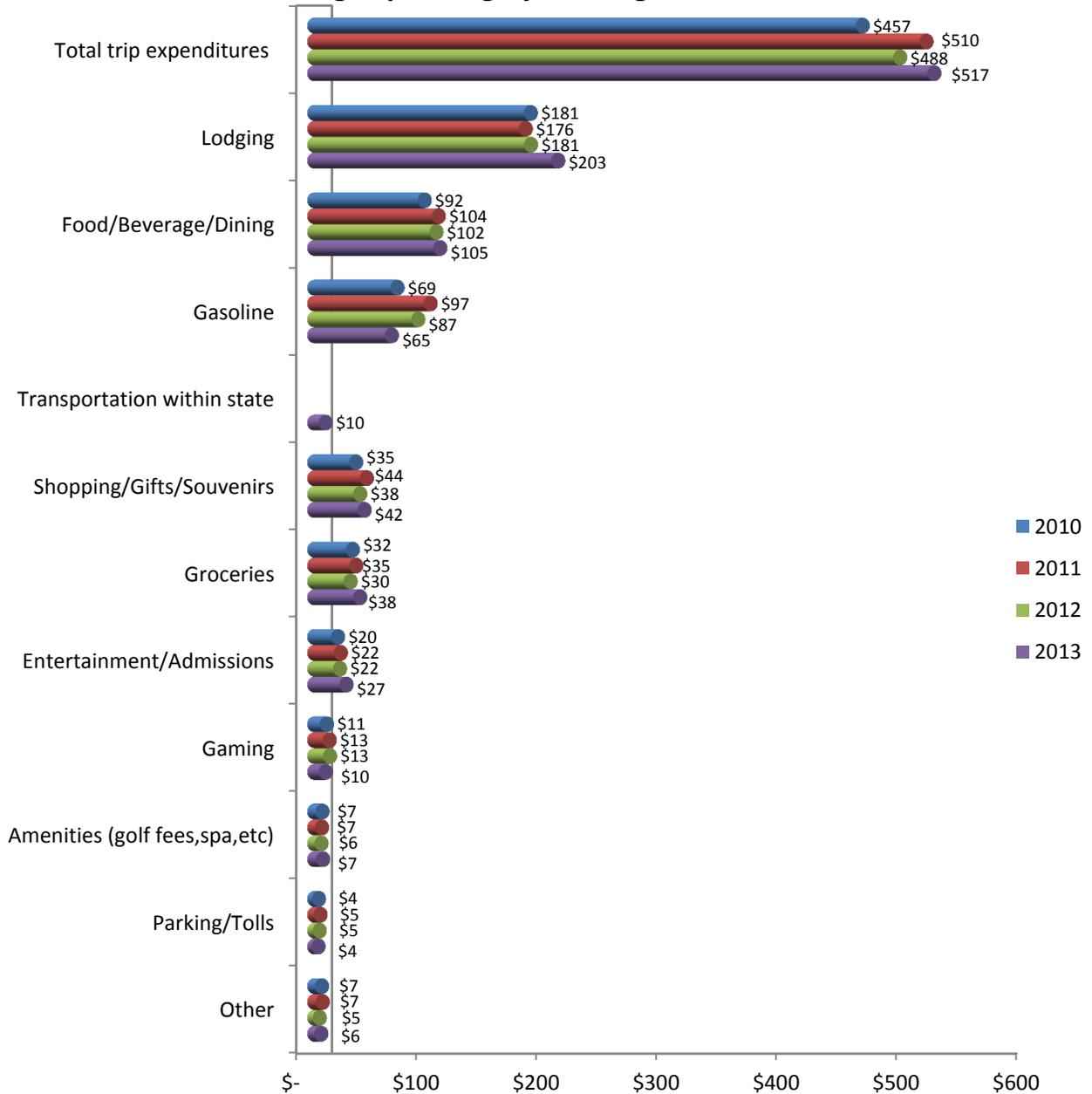
### Top Methods of Booking Travel



### Expenditures by North Carolina Visitors

The average overnight visitor party spending in the state was \$517, up six percent from 2012. Lodging expenditures increased more than twelve percent, reflective of both increases in ADR and increased overnight visitor volume. Expenditures on groceries, entertainment, shopping and amenities also increased from 2012.

**Average Spending by Overnight Visitor Parties**



\*Transportation categories changed in 2013 to better reflect transportation to versus within the state, thus comparisons to previous years for that category are not valid. Total expenditures for years prior to 2013 have been revised to allow for accurate comparisons.

## Activities

Over one-third (34%) of 2013 overnight visitors to North Carolina visited relatives while traveling to the state. About one-fifth shopped (22%) and visited friends (19%) while traveling in North Carolina. Other popular activities included visiting a beach (19%), rural sightseeing (16%), fine dining (15%), visiting historic sites/churches (11%) and state/national parks (11%).

*\*Note that responses to this question are not mutually exclusive and percentages do not equal 100%. Therefore, proportions should not be aggregated to combine categories of activities. Also note that these activities do not imply purpose of trip.*

### Activities Participated in by Overnight Visitors to North Carolina

Activity	2010	2011	2012	2013
Visiting Relatives	37%	36%	35%	34%
Shopping	21%	21%	21%	22%
Visiting Friends	19%	18%	17%	19%
Beach	18%	16%	18%	19%
Rural Sightseeing	13%	15%	14%	16%
Fine Dining	14%	14%	13%	15%
Historic Sites/Churches	8%	10%	9%	11%
State/National Park	9%	9%	8%	11%
Urban Sightseeing	7%	9%	8%	10%
Museums	7%	8%	6%	10%
Wildlife Viewing	6%	6%	6%	7%
Old Homes/Mansions	5%	5%	4%	7%
Hiking/Backpacking	4%	4%	4%	5%
Gardens	3%	4%	4%	5%
Nightclubs/Dancing	4%	4%	4%	4%
Nature Travel/Eco-touring	3%	3%	3%	4%
Art Galleries	3%	4%	3%	4%
Bird Watching	3%	2%	2%	4%
Fishing (fresh or saltwater)	4%	3%	4%	4%
Casino/Gaming	2%	3%	3%	3%
Camping	2%	2%	2%	3%
Special Events/Festivals	3%	3%	3%	3%
Wine Tasting/Winery Tour	2%	2%	3%	3%
Golf	3%	3%	3%	3%
Theme Park	1%	2%	2%	3%
Biking	2%	2%	2%	2%
Theater/Drama	2%	2%	2%	2%
Spa/Health Club	2%	2%	1%	2%
Craft Breweries	N/A	N/A	N/A	2%
Musical Theater	1%	1%	1%	2%
Zoos	2%	2%	3%	2%
Whitewater Rafting/Kayaking/Canoeing	2%	1%	2%	1%
Youth/Amateur/Collegiate Sporting Event	2%	2%	2%	1%
Motorboat/Jet ski	1%	1%	1%	1%
Symphony/Opera/Concert	0%	1%	1%	1%

## **Demographic Profile of North Carolina Overnight Visitors**

More than half (57.5%) of the overnight visitors to North Carolina are married and just under one-fourth of the region's visitors are divorced, widowed or separated.

The largest proportion of North Carolina overnight visitors classify themselves as white (83.3%), and eleven percent classify themselves as black/African American.

Two-thirds (65.8%) of North Carolina overnight visitor parties have a household head with a college degree or higher. The average overnight visitor is 48 years old, with over half (56.9%) being 45 years old or older.

The average North Carolina overnight visitor has 10.7 vacation days each year.

Over forty percent (40.1%) of the overnight visitor parties that traveled to North Carolina in 2013 had a household income \$75,000 or over. Over thirteen percent had a household income of over \$125,000. The average income of an overnight visitor party in 2013 was \$74,438.

## 2013 Top Advertising Markets

In 2013, the top advertising markets sending overnight visitors to **North Carolina** were Raleigh-Durham-Fayetteville (13.0%), Charlotte (9.0%), Greensboro-Winston-Salem-High Point (6.3%), Atlanta (5.3%), Greenville-Spartanburg-Asheville (4.5%), New York (4.2%), Washington DC (4.0%), and Greenville-New Bern-Washington (3.5%). Advertising markets correspond with Nielsen’s Designated Market Areas (DMAs).

**Top Advertising Markets of Origin for 2013 North Carolina Overnight Visitors**

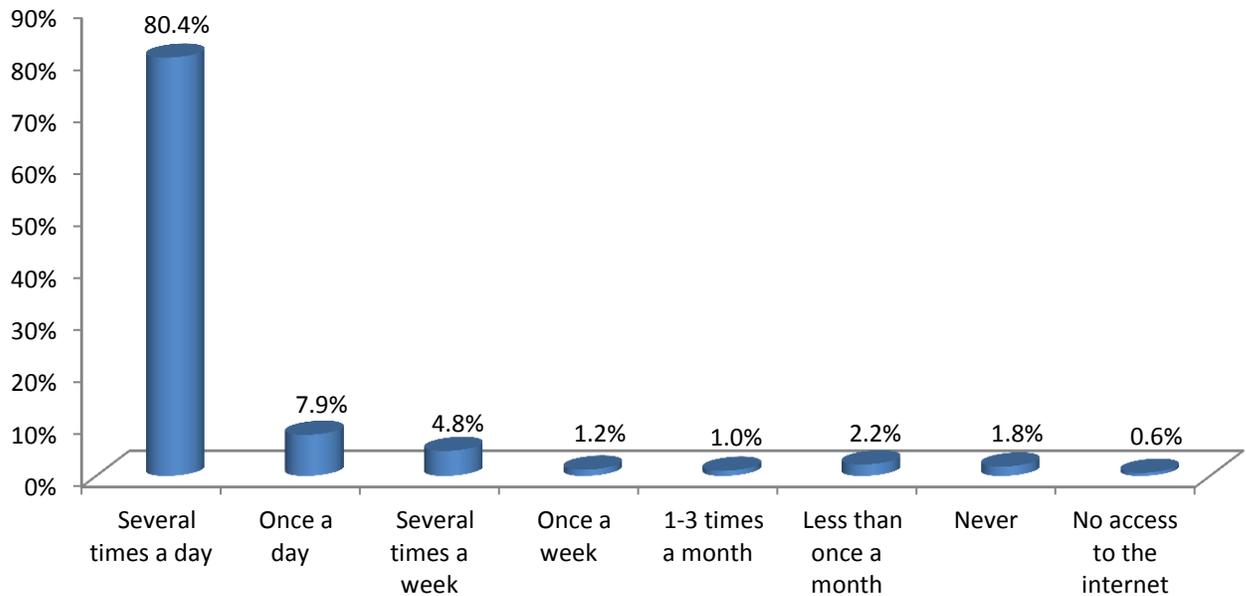
<b>DMA of Origin</b>	<b>2010 Percentage of Total Overnight Visitors</b>	<b>2011 Percentage of Total Overnight Visitors</b>	<b>2012 Percentage of Total Overnight Visitors</b>	<b>2013 Percentage of Total Overnight Visitors</b>
Raleigh-Durham (Fayetteville)	13.1%	11.7%	10.9%	13.0%
Charlotte	8.5%	9.5%	10.0%	9.0%
Greensboro-High Point-Winston Salem	5.9%	6.8%	6.9%	6.3%
Atlanta	4.2%	5.5%	4.9%	5.3%
Greenville-Spartanburg-Asheville-Anderson	4.2%	3.7%	5.0%	4.5%
New York, NY	4.6%	4.3%	4.2%	4.2%
Washington DC (Hagerstown, MD)	4.0%	3.3%	3.9%	4.0%
Greenville-New Bern-Washington	3.8%	4.0%	3.4%	3.5%
Wilmington	2.0%	1.9%	1.1%	2.4%
Norfolk-Portsmouth-Newport News	2.8%	2.7%	2.5%	2.3%
Columbia, SC	1.8%	1.6%	1.6%	2.2%
Philadelphia, PA	2.6%	1.9%	1.4%	2.0%
Orlando-Daytona Beach-Melbourne	2.0%	1.6%	1.4%	1.7%
Tampa-St. Petersburg (Sarasota)	2.0%	2.0%	2.2%	1.7%
Richmond-Petersburg, VA	2.0%	1.8%	1.8%	1.6%
Roanoke/Lynchburg, VA	1.8%	1.6%	1.9%	1.6%
Pittsburgh	1.1%	1.1%	1.2%	1.3%
Tri-Cities, TN-VA	0.8%	0.9%	0.5%	1.3%
Chicago	1.2%	1.3%	1.2%	1.3%

Note: Advertising markets defined by Nielsen’s Designated Market Area (DMA)

## Importance of Internet

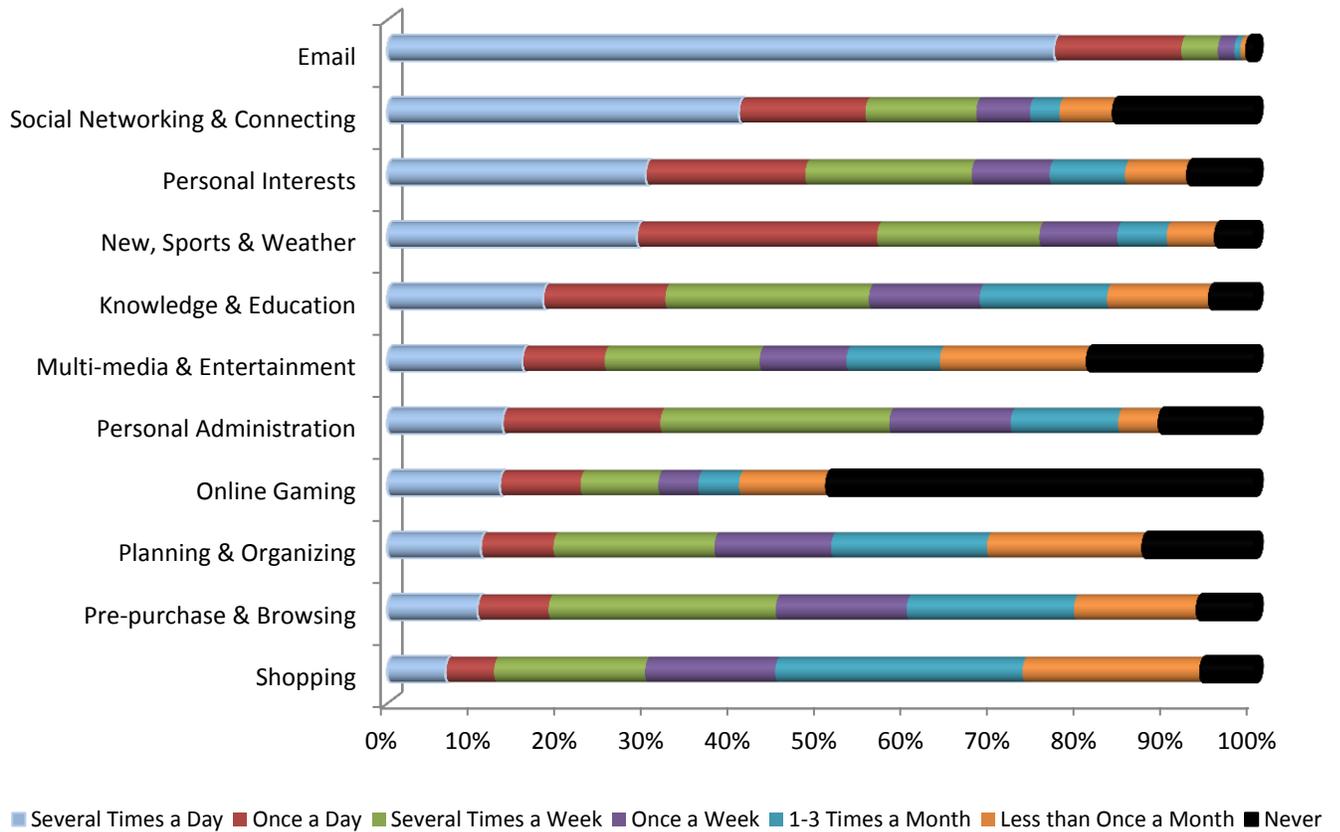
More than eighty percent of North Carolina overnight visitors indicate that they access the Internet at least several times daily. Less than one percent does not have Internet access.

**Frequency of Internet Use by 2013 North Carolina Overnight Visitors**



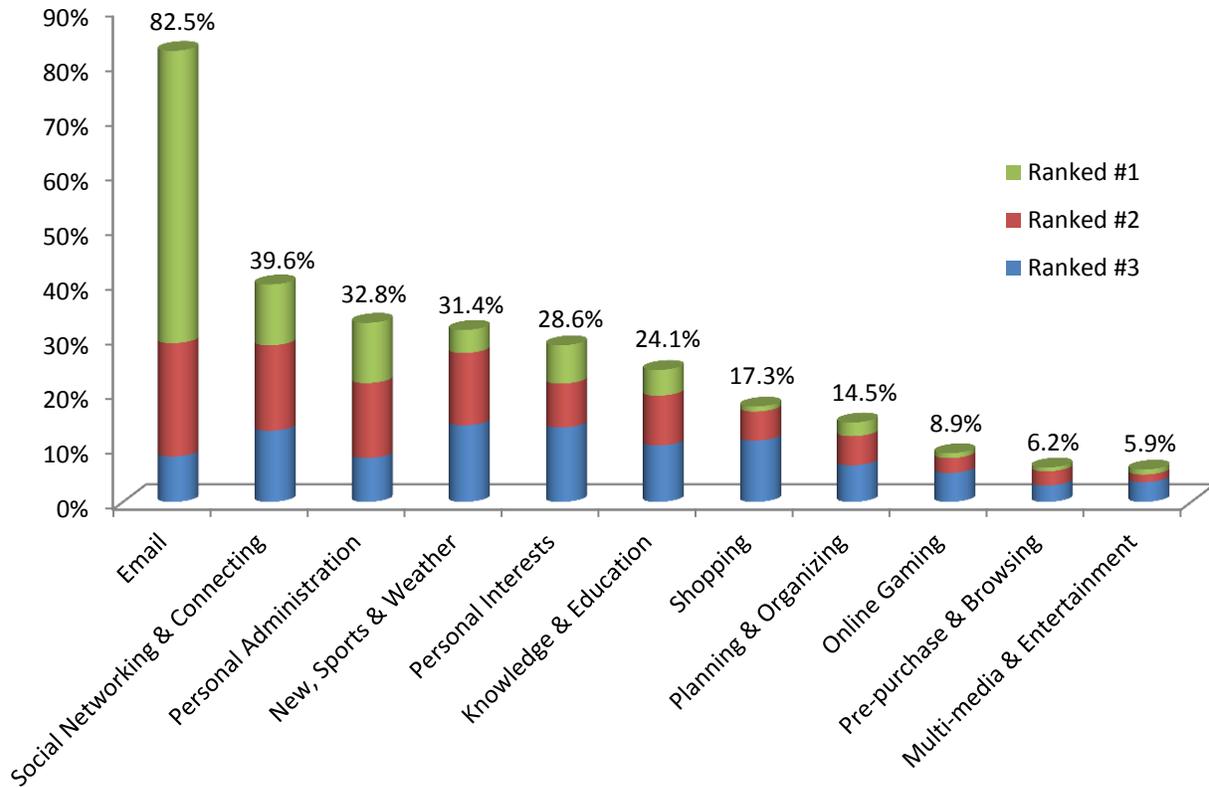
Visitors use the Internet for a variety of purposes, some more often than others. Over three-fourths of visitors use email several times a day, while nearly half use social media several times a day.

### Frequency of Online Activities of North Carolina Overnight Visitors



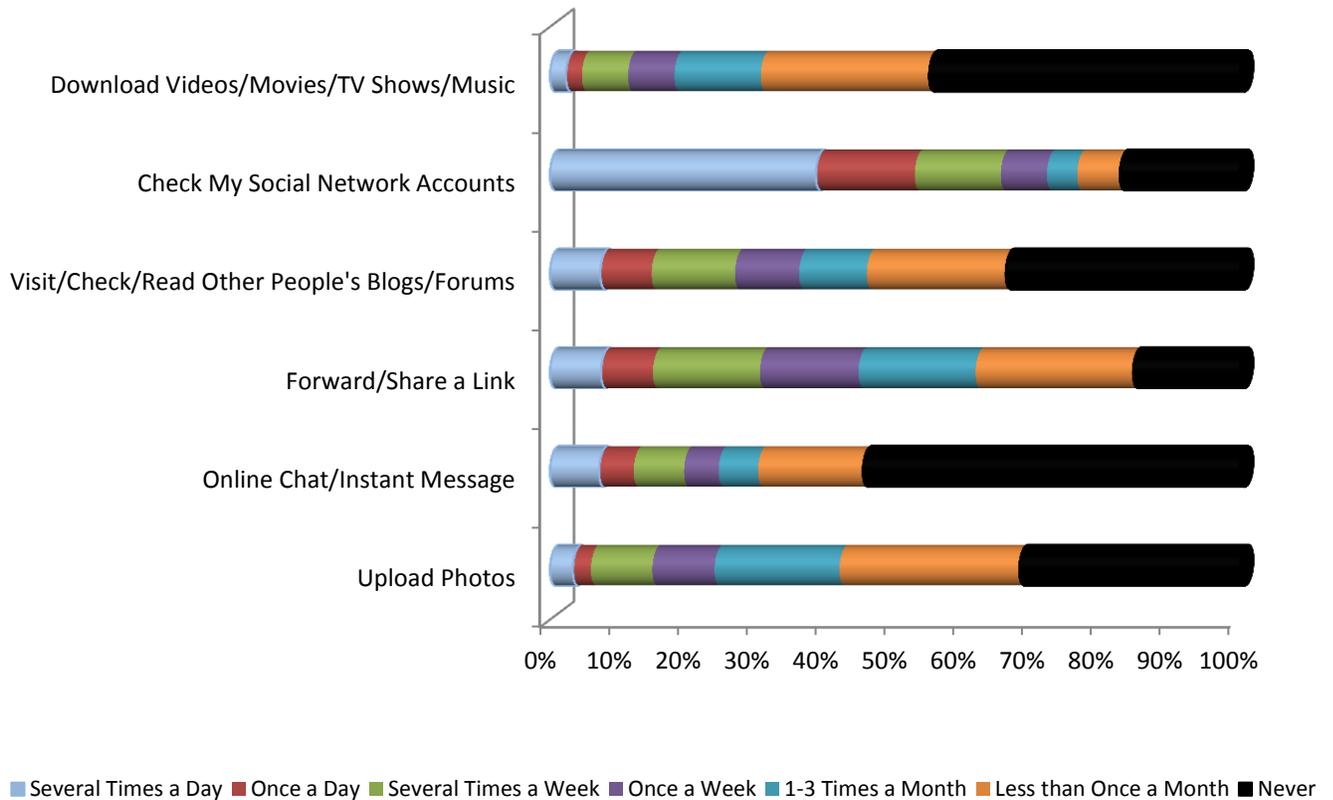
North Carolina overnight visitors use the Internet for numerous purposes, but email (82.5%) outweighed all other uses by far. Over half (53.4%) ranked email as their top use of the Internet.

### Online Activities Ranked by Importance to 2013 North Carolina Overnight Visitors



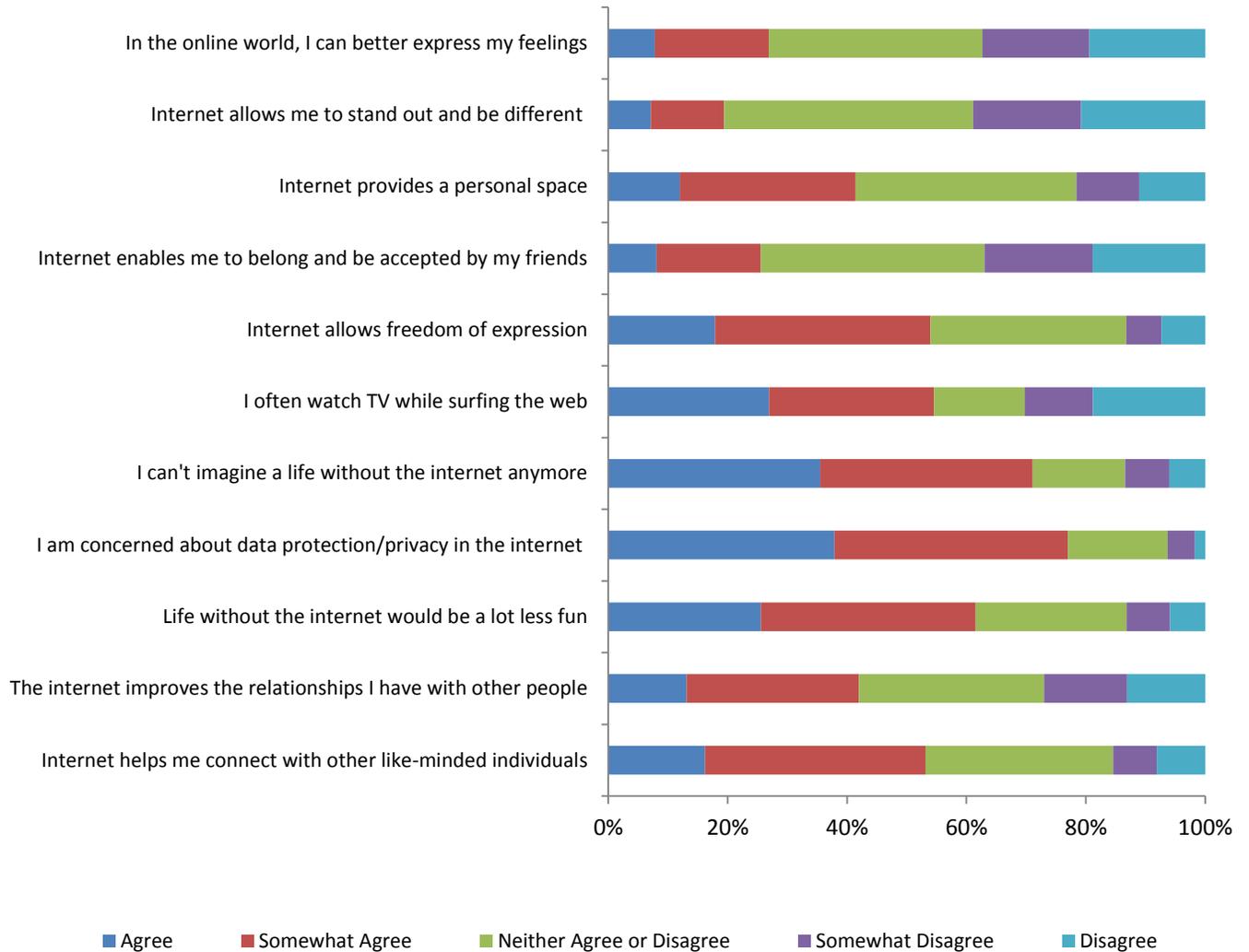
Other frequent online activities of overnight visitors to the state include checking social media accounts, forwarding links and uploading photos.

### Other Online Activities of North Carolina Overnight Visitors

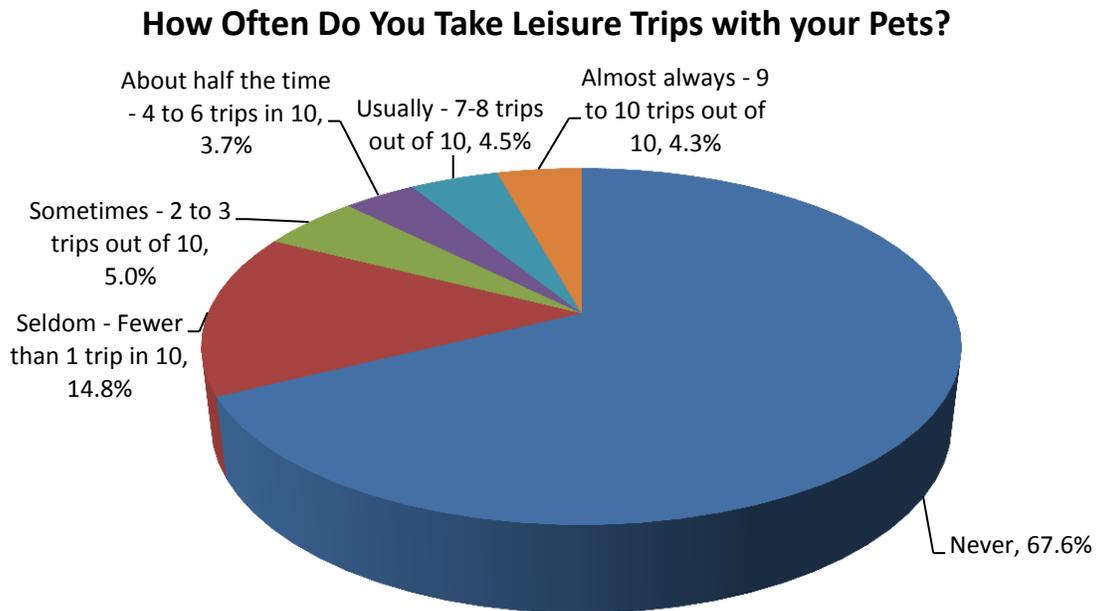


Over three-quarters of overnight visitors to North Carolina are concerned about data protection/privacy on the Internet, yet nearly the same proportion of respondents (71%) strongly agrees or agrees that they can't imagine life without it anymore. Over half (62%) strongly agree or agree that life without the Internet would be a lot less fun.

### Personal Views of the Internet of North Carolina Visitors

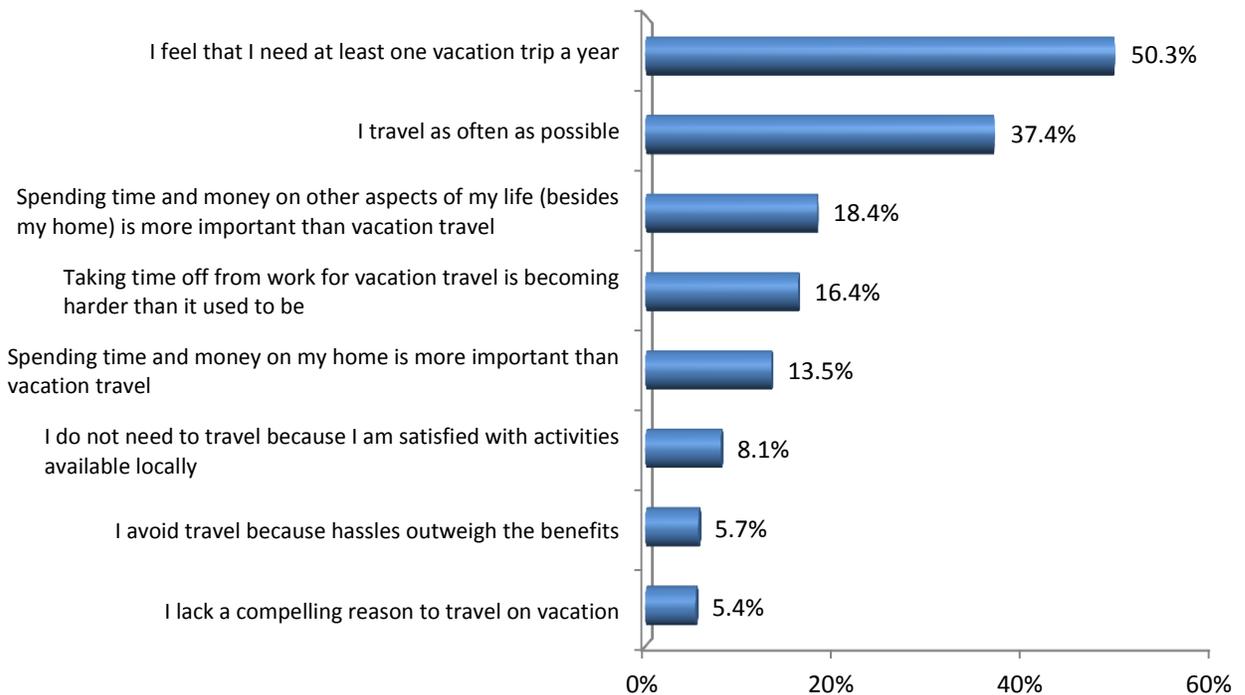


## Vacation Attitudes



Half of North Carolina overnight visitors feel they need at least one vacation a year, and over a third indicate that they travel as often as possible.

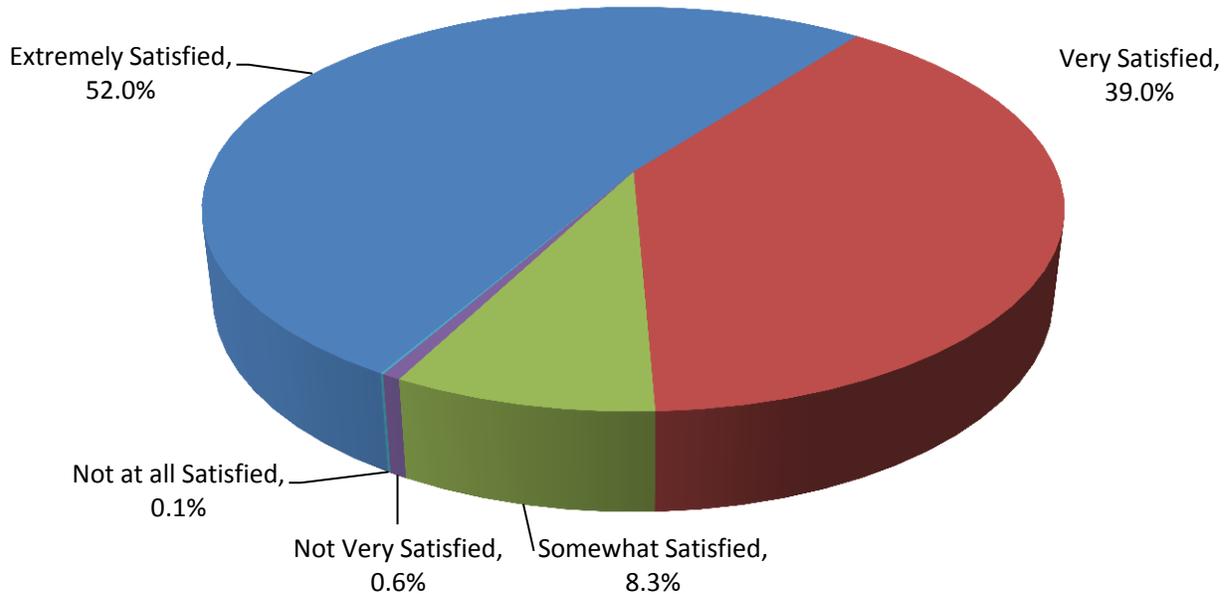
### Current Feelings Concerning Vacation Travel



## Satisfaction with Overnight Visits to North Carolina

Ninety-one percent of overnight visitors to North Carolina in 2013 were either very or extremely satisfied with their visit. Only 0.1 percent was not at all satisfied.

**Satisfaction with Overnight Visit to North Carolina**



## 2013 North Carolina Daytrip Visitor Profile

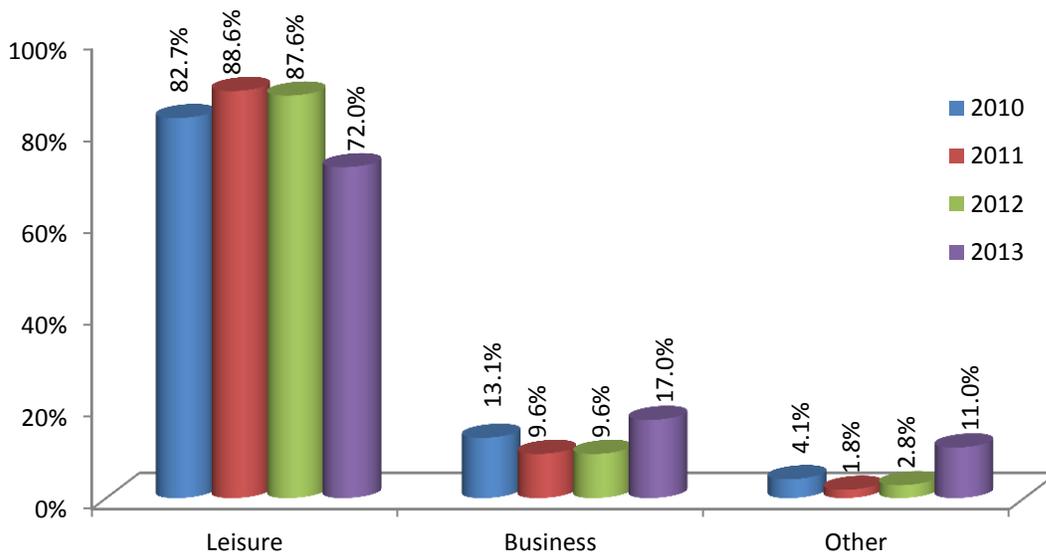
### Summary

- ◆ A daytripper is defined as a visitor who did not spend any nights away from home, but traveled at least 50 miles one-way from home. In 2013, approximately 14.9 million daytrips were taken in North Carolina. North Carolina ranked #5 in the US in terms of daytrip visitation.
- ◆ Seventy-two percent of all daytrippers visited North Carolina for pleasure purposes, while seventeen percent of visitors came to conduct business (includes meeting/convention). The remaining respondents indicated an “other” reason for visiting the state.
- ◆ The fall (September - November) was the most popular season for day travel to North Carolina, with twenty-nine percent of all 2013 daytrippers, followed by winter (December-February) with twenty-four percent, and spring (March-May) and summer (June - August) with twenty-three percent each. October was the single largest month for day travel to the state with more than twelve percent, followed closely by July with twelve percent.
- ◆ The average travel party size for daytrip visitor parties to North Carolina was 1.9 people. Twenty-five percent of travel parties to the state included children in the party.
- ◆ Ninety-two percent of daytrippers to the state drove (includes personal automobile, rental, motorcycle and RV).
- ◆ In 2013, the average household trip expenditure for daytrip parties to the state was approximately \$134 per visit.
- ◆ The top states of origin of *daytrippers* to North Carolina were in-state residents (56.0%), and the nearby states of South Carolina (13.3%), Florida (5.2%), Georgia (3.5%) and Virginia (3.0%).
- ◆ Forty-three percent of the households that traveled to North Carolina on a daytrip in 2013 had a household income over \$50,000.
- ◆ In 2013, Charlotte (22.1%) was the top advertising market of origin for *daytrippers* to the state, followed by Raleigh/Durham/Fayetteville (21.9%), Greensboro/High Point/Winston Salem (15.8%), Greenville-Spartanburg-Asheville (10.4%), and Greenville-New Bern-Washington (9.3%).

### Main Purpose of Visit

In 2013, seventy-one percent (71.1%) of daytrippers visited North Carolina for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. The proportion of daytrippers who visited for general business, convention, seminar or other group meeting grew from ten percent in 2012 to seventeen percent in 2013.

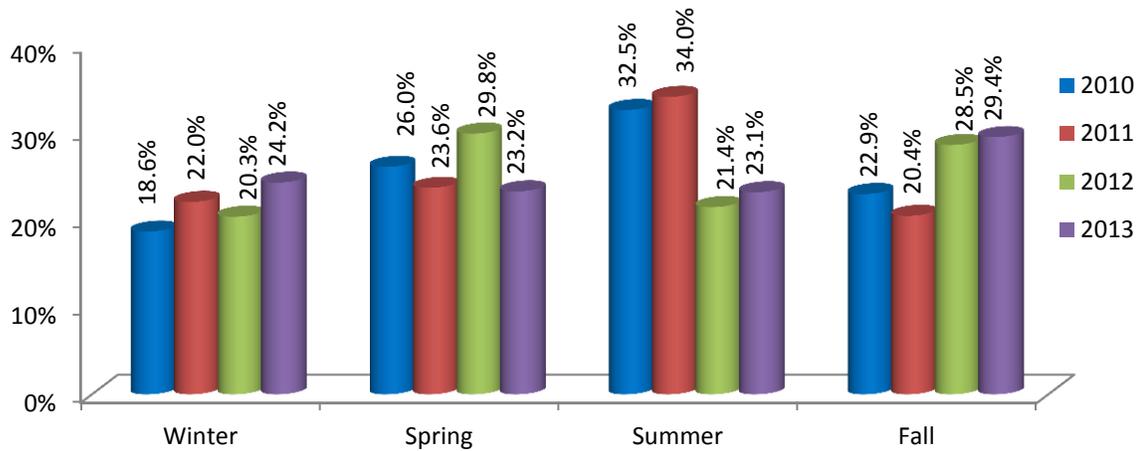
Primary Purpose of Daytrip to North Carolina



### Travel Volume by Season

In 2013, daytrip travel to and within North Carolina became more consistent than in previous years. Fall (September through November) was the most popular season to visit with twenty-nine percent, but was followed very closely by the other seasons.

**Daytrip Travel by Season to North Carolina**



### Travel Party Size

The average travel party size for all North Carolina daytrippers was 1.9 people.

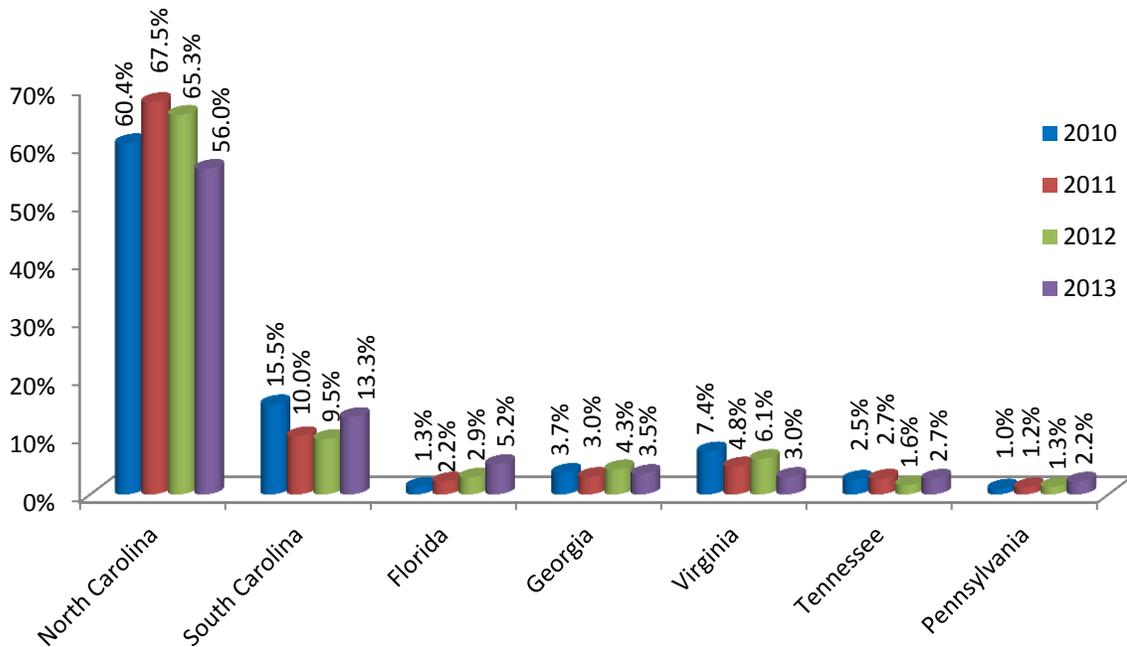
### Children on Trip

Twenty-five percent of daytrip parties to North Carolina included children. Among those who traveled with children, the average number of children on trips was 1.9.

### Origin of Visitors

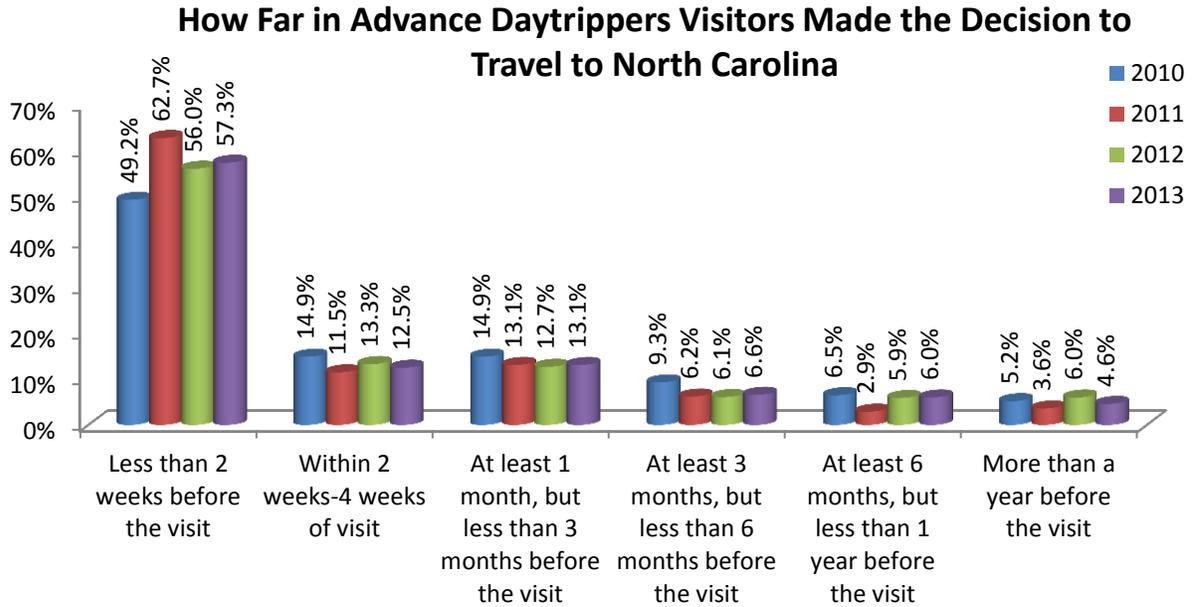
Not surprisingly, the top states of origin for North Carolina daytrippers were in-state residents and those from states contiguous to the state; North Carolina (56.0%), South Carolina (13.3%), Florida (5.2%) and Georgia (3.5%). Florida was actually ahead of Virginia (3.0%) Tennessee (2.7%) in terms of proportion of overall daytrippers to the state.

**Top States of Origin of Daytrippers to North Carolina**

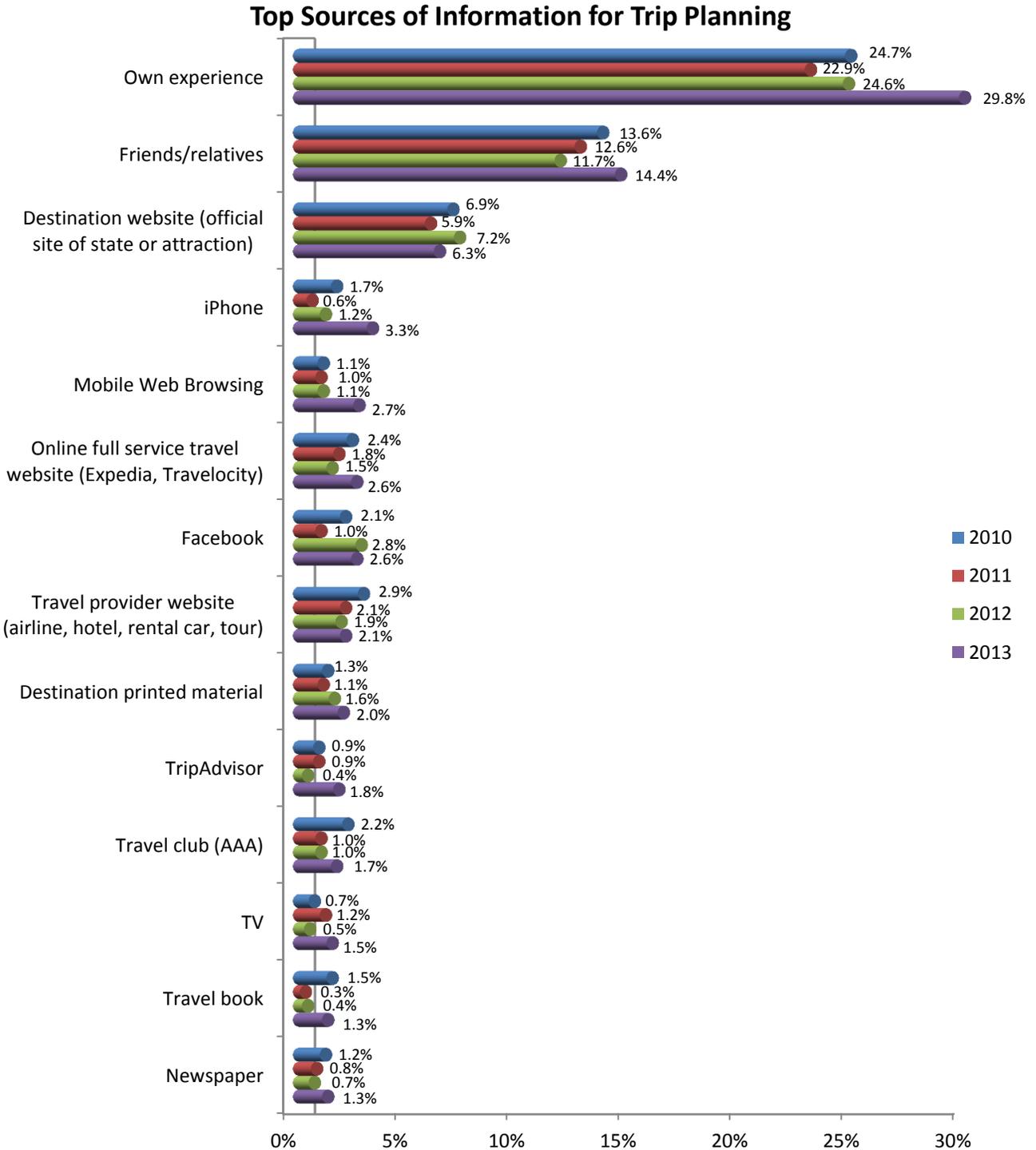


### Trip Planning

Not surprisingly, daytrippers to and within North Carolina planned their visits within a shorter timeframe than overnighters. More than half of 2013 daytrip visitors made the decision to visit North Carolina less than two weeks before the visit.



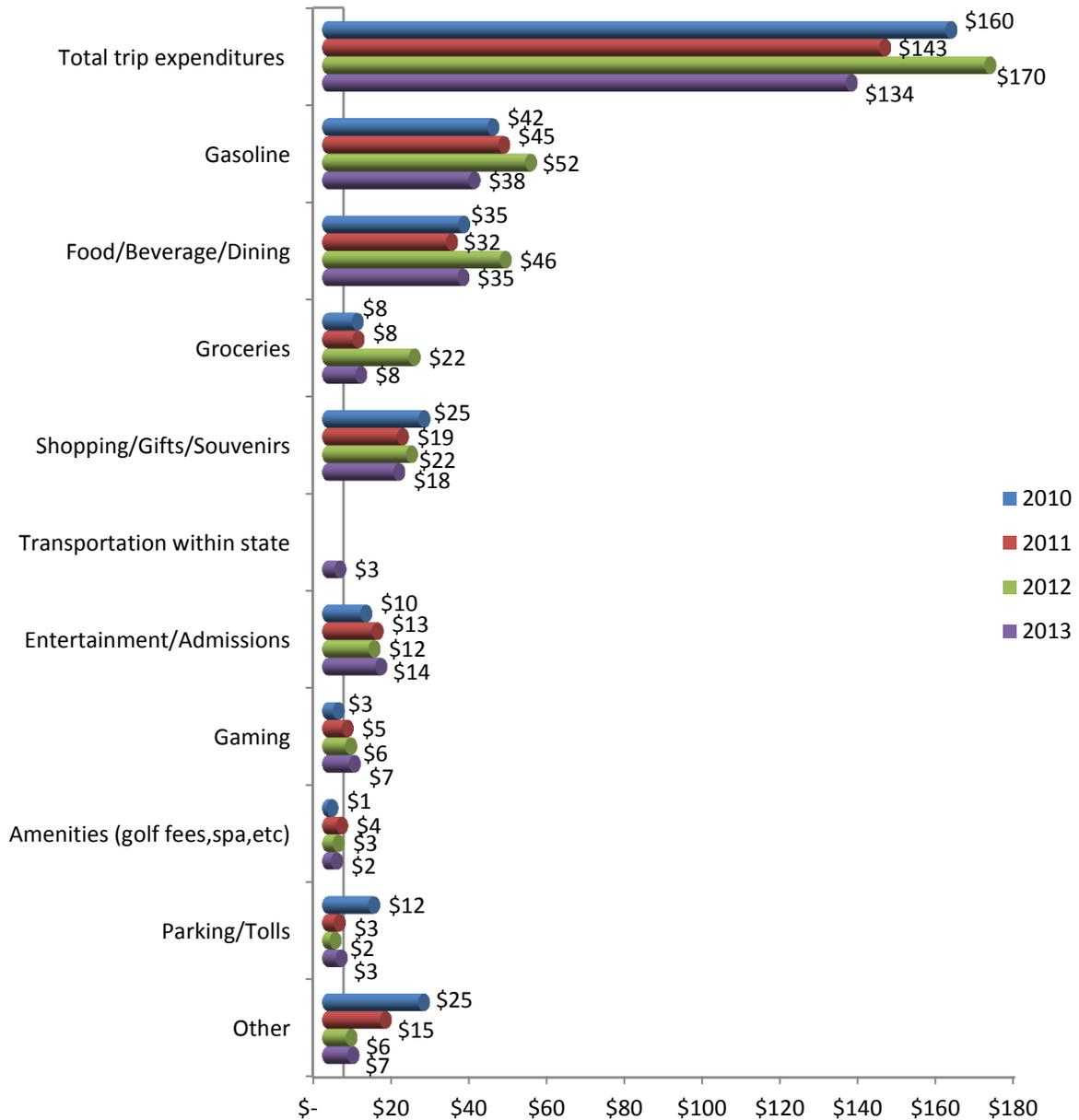
The top source of information for daytrip planning in North Carolina is personal experience, followed by friends/relatives and destination websites. The iPhone and other mobile web browsing ranked fourth and fifth in terms of daytrip planning.



### Expenditures by North Carolina Daytrippers

The average daytrip visitor party spending in the state was \$134, down from \$170 in 2013. Most of the decrease came in food/beverage spending by leisure daytrippers.

**Average Spending by Daytrip Visitor Parties to North Carolina**



\*Transportation categories changed in 2013 to better reflect transportation to versus within the state, thus comparisons to previous years for that category are not valid. Total expenditures for years prior to 2013 have been revised to allow for accurate comparisons.

## Activities

More than twenty percent (20.5%) of the daytrippers to North Carolina visited relatives or participated in a family reunion while on a daytrip in the state. Nearly ten percent participated in shopping and rural sightseeing, while nine percent visited friends. *\*Note that responses to this question are not mutually exclusive and percentages do not equal 100%. Therefore, proportions should not be aggregated to combine categories of activities. Also note that these activities do not imply purpose of trip.*

### Activities Participated in by Daytrippers to North Carolina

Activity	2010	2011	2012	2013
Visiting Relatives/Family Reunion	19.3%	20.6%	19.1%	20.5%
Shopping	10.8%	11.1%	11.6%	9.7%
Rural Sightseeing	9.5%	8.9%	12.9%	9.6%
Visiting Friends	8.9%	7.5%	7.8%	9.1%
State/National Park	5.4%	4.9%	6.5%	6.1%
Urban Sightseeing	3.2%	4.4%	4.3%	5.3%
Fine Dining	4.4%	4.9%	7.1%	5.0%
Historic Sites/Churches	2.8%	3.4%	4.2%	4.9%
Beach	4.7%	5.1%	10.5%	4.2%
Wildlife Viewing	3.4%	3.0%	4.5%	3.6%
Nature Travel/Ecotouring	2.3%	2.4%	1.6%	3.1%
Casino/Gaming	1.0%	2.5%	2.9%	3.1%
Museums	2.5%	2.3%	4.8%	2.9%
Old Homes/Mansions	1.6%	1.6%	2.2%	2.2%
Gardens	0.5%	1.7%	2.8%	2.0%
Art Galleries	1.0%	1.2%	1.4%	2.0%
Hiking/Backpacking	3.0%	2.3%	2.4%	1.6%
Bird Watching	1.4%	1.3%	1.0%	1.6%
Special Events/Festivals	1.1%	1.9%	0.8%	1.2%
Wine Tasting/Winery Tour	0.9%	0.5%	1.4%	1.2%
Theme Park	1.7%	1.4%	0.7%	1.2%
Biking	0.9%	1.1%	1.5%	1.0%
Theater/Drama	0.3%	0.7%	0.8%	1.0%
Music Theater	0.7%	0.9%	0.3%	1.0%
Nightclubs/Dancing	1.0%	1.1%	1.1%	0.9%
Fishing (fresh or saltwater)	0.9%	0.7%	2.6%	0.9%
Golf	0.4%	0.9%	1.1%	0.9%
Symphony/Opera/Concert	0.6%	0.4%	1.1%	0.9%
Whitewater Rafting/Kayaking/Canoeing	0.8%	0.8%	0.8%	0.8%
Hunting	0.0%	0.3%	0.2%	0.8%
Spa/Health Club	0.3%	0.0%	0.3%	0.7%
Zoos	2.1%	1.3%	1.0%	0.7%

## **Demographic Profile of North Carolina Daytrip Visitors**

More than half of North Carolina daytrippers (54.2%) of the visitors are married and just over a quarter of the region's visitors are divorced, widowed or separated.

The largest proportion of North Carolina daytrippers classify themselves as white (83.4%), and twelve percent classify themselves as black/African American.

Over half (54.5%) of North Carolina daytrippers have a household head with a college degree or higher. The average daytripper is 48 years old, with over half (56.1%) being 45 years old or older.

The average North Carolina daytripper has 9.2 vacation days each year.

Nearly one-quarter (24.2%) of the daytrip visitor parties that traveled to North Carolina in 2013 had a household income \$75,000 or over. Six percent had a household income of over \$125,000. The average income of an daytrip visitor party in 2013 was \$53,531.

## 2013 Top Advertising Markets

In 2013, the top advertising markets sending daytrippers to **North Carolina** were Charlotte (22.1%), Raleigh-Durham-Fayetteville (21.9%), Greensboro-Winston-Salem-High Point (15.8%), Greenville-Spartanburg-Asheville (10.4%), and Greenville-New Bern-Washington (9.3%). Advertising markets correspond with Nielsen’s Designated Market Areas (DMAs).

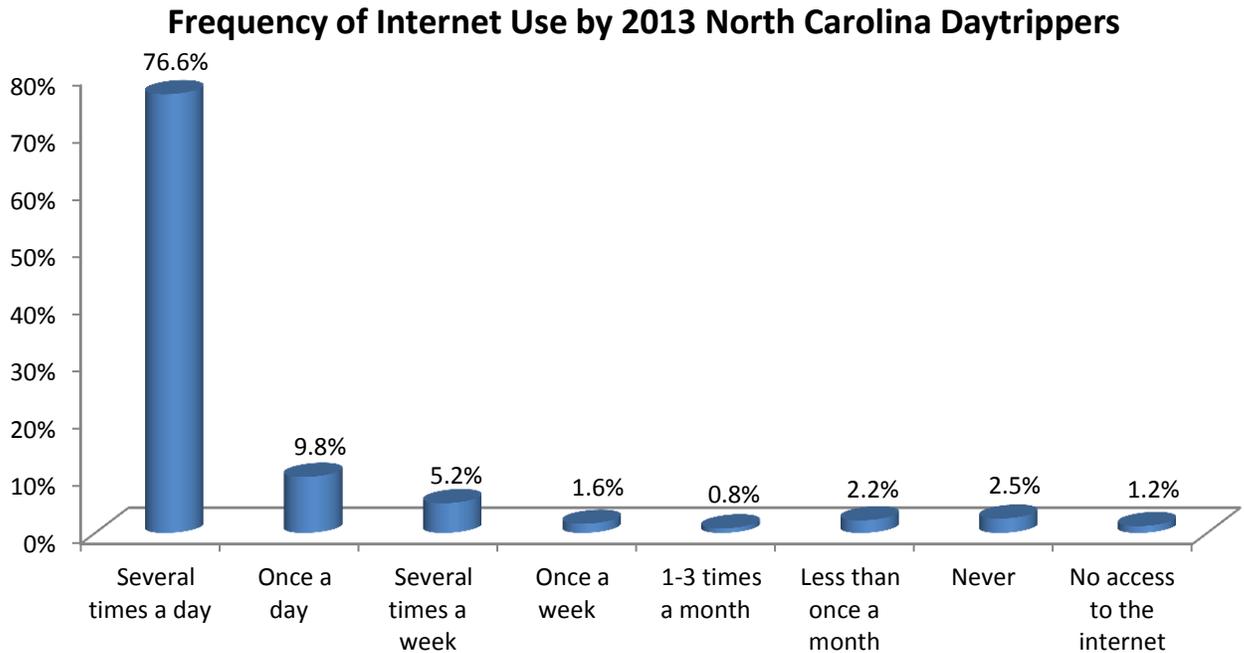
**Top Advertising Markets of Origin for North Carolina Daytrippers**

<b>DMA of Origin</b>	<b>2010 Percentage of Total Overnight Visitors</b>	<b>2011 Percentage of Total Overnight Visitors</b>	<b>2012 Percentage of Total Overnight Visitors</b>	<b>2013 Percentage of Total Overnight Visitors</b>
Charlotte	17.5%	21.1%	16.5%	22.1%
Raleigh-Durham (Fayetteville)	20.3%	22.7%	22.6%	21.9%
Greensboro-High Point-Winston Salem	14.8%	11.2%	19.0%	15.8%
Greenville-Spartanburg-Asheville-Anderson	11.4%	10.4%	13.3%	10.4%
Greenville-New Bern-Washington	9.9%	9.7%	7.7%	9.3%
Wilmington	2.7%	5.0%	3.1%	3.8%
Columbia	3.2%	2.8%	1.8%	2.5%
Atlanta	1.8%	2.5%	3.6%	2.3%
Norfolk-Portsmouth-Newport News	4.5%	3.5%	3.5%	2.2%
Tri-Cities, TN-VA	2.2%	1.0%	0.9%	1.7%
Roanoke-Lynchburg	2.8%	2.0%	2.2%	1.6%
Knoxville	0.7%	0.8%	0.4%	0.9%

Note: Advertising markets defined by Nielsen’s Designated Market Area (DMA)

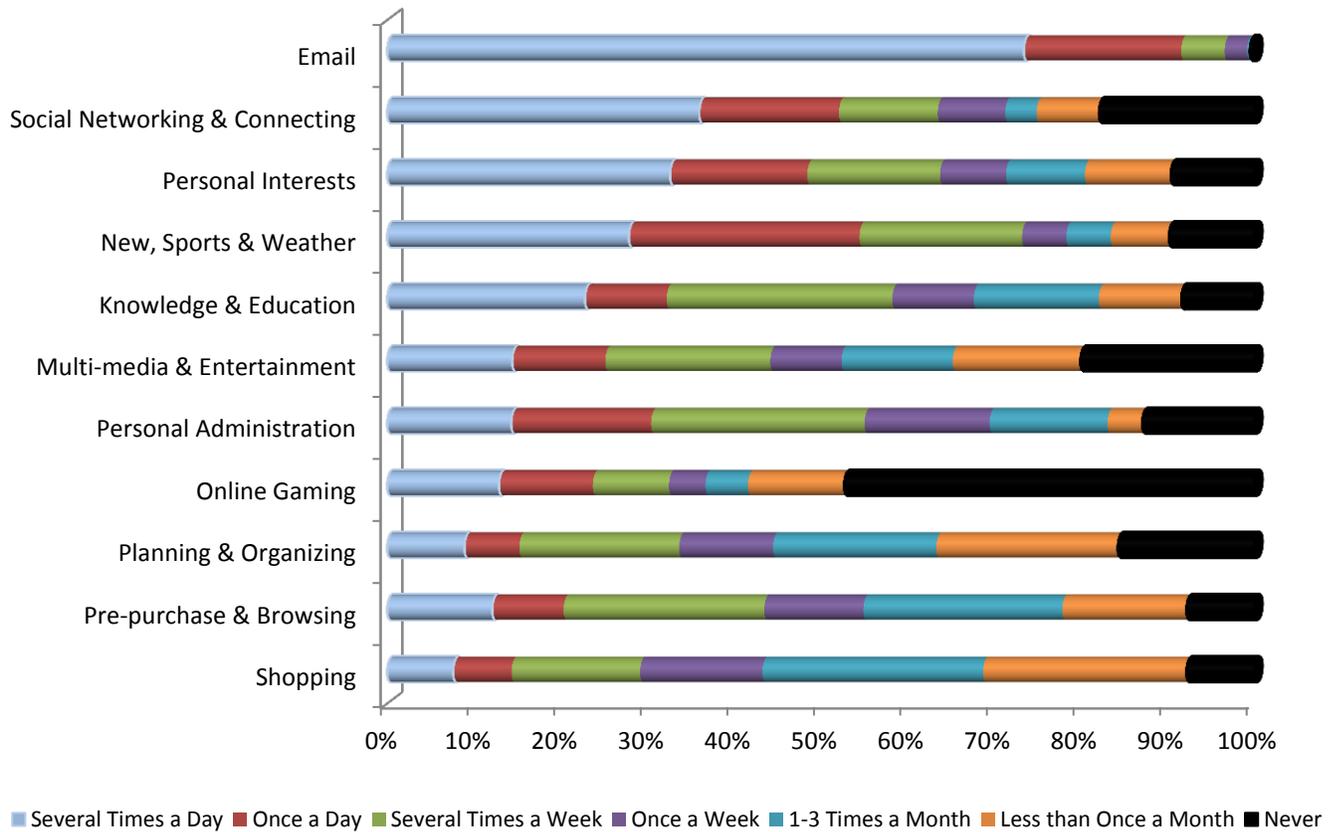
## Importance of Internet

More than three-quarters of North Carolina daytrippers indicate that they access the Internet at least several times daily. Just more than one percent does not have Internet access.



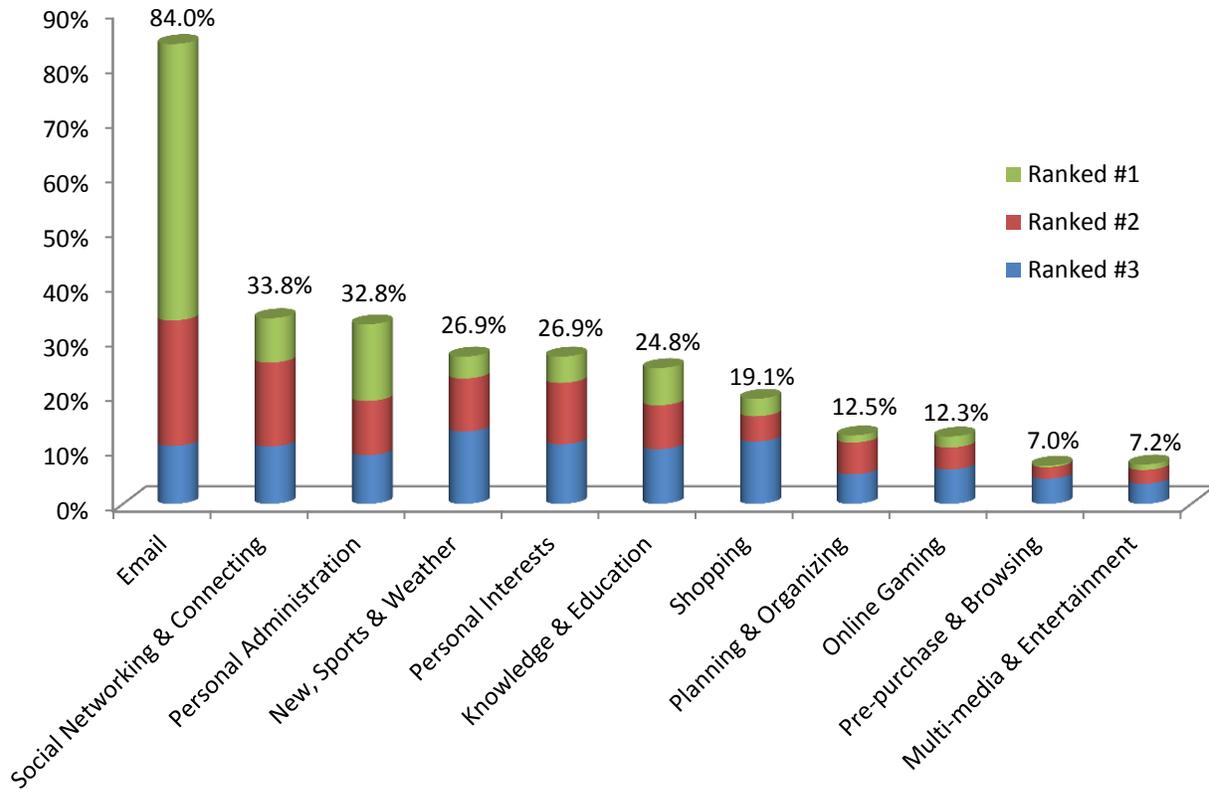
Visitors use the Internet for a variety of purposes, some more often than others. Nearly three-fourths of daytrippers use email several times a day, while more than one-third use social media several times a day.

### Frequency of Online Activities of North Carolina Daytrippers



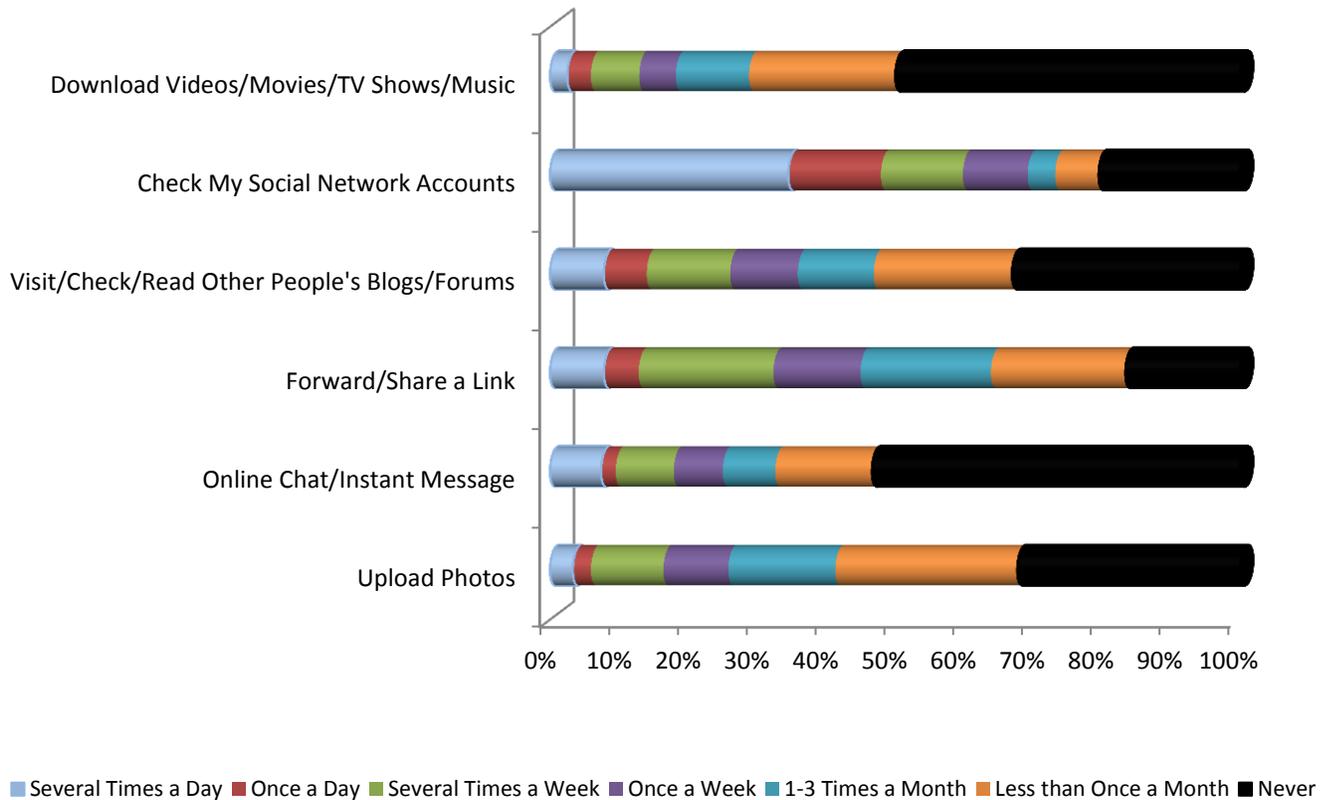
North Carolina day visitors use the Internet for numerous purposes, but email (82.5%) outweighed all other uses by far. Over half (53.4%) ranked email as their top use of the Internet.

### Online Activities Ranked by Importance to 2013 North Carolina Daytrippers



Other frequent online activities of overnight visitors to the state include checking social media accounts, forwarding links and reading blogs.

### Other Online Activities of North Carolina Overnight Visitors

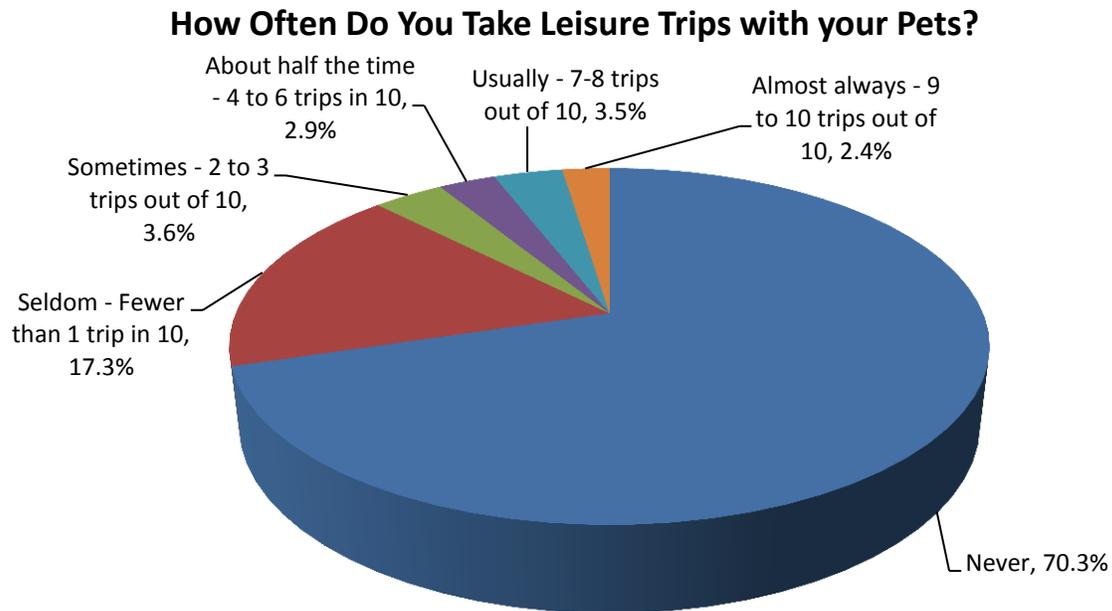


Over three-quarters of daytrippers to North Carolina are concerned about data protection/privacy on the Internet, though two-thirds of respondents strongly agree or agree that they can't imagine life without it anymore. Over half (60%) strongly agree or agree that life without the Internet would be a lot less fun and that it helps them connect with other like-minded people (54.5%).

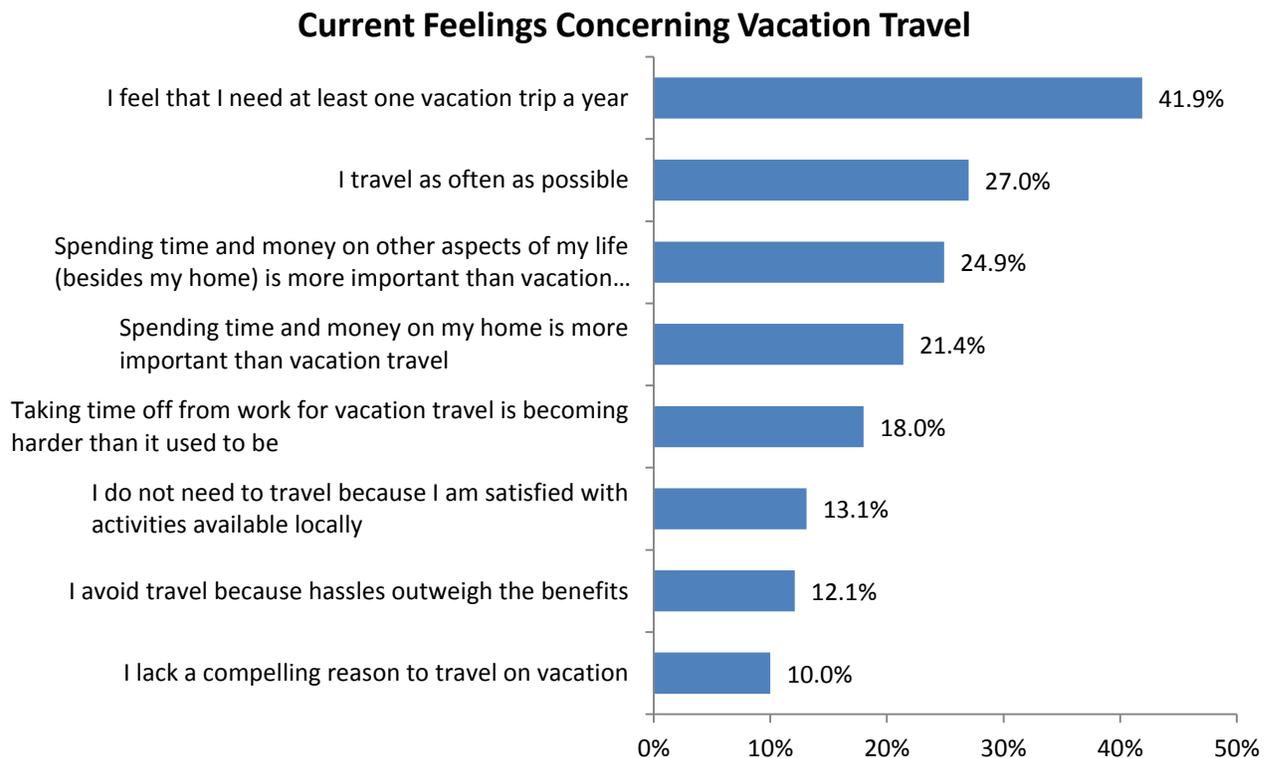
### Personal Views of the Internet of North Carolina Daytrippers



## Vacation Attitudes



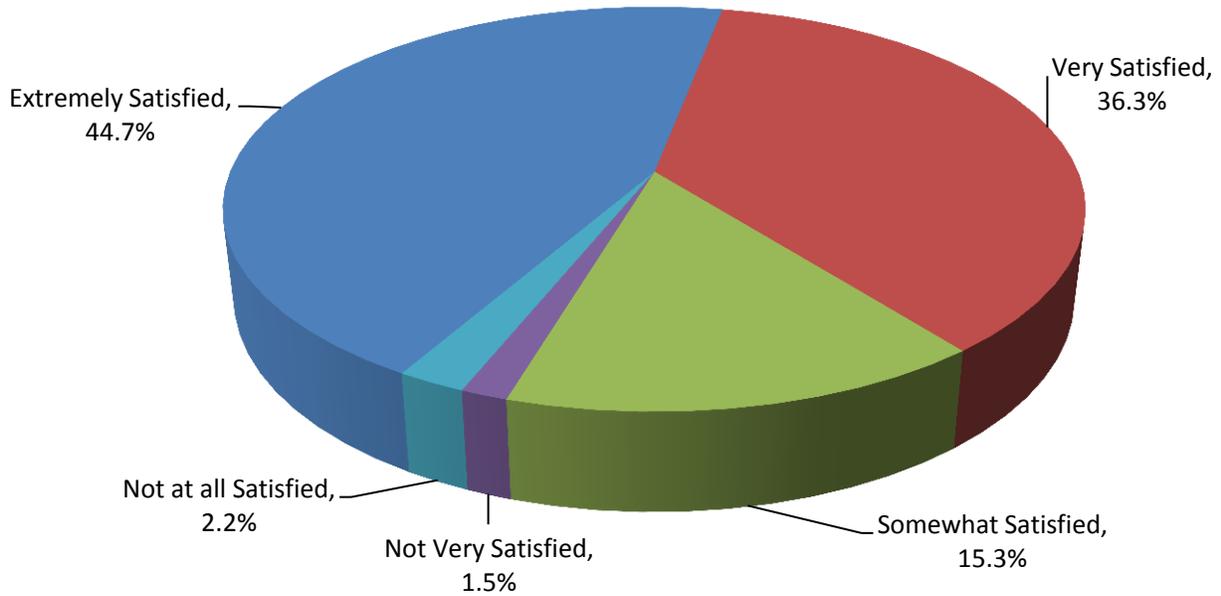
Nearly half of North Carolina daytrippers feel they need at least one vacation a year, and over a quarter indicate that they travel as often as possible.



## Satisfaction with Daytrips to North Carolina

Eighty-one percent of daytrippers to North Carolina in 2013 were either very or extremely satisfied with their daytrip to or within the state.

**Satisfaction with Daytrip to North Carolina**

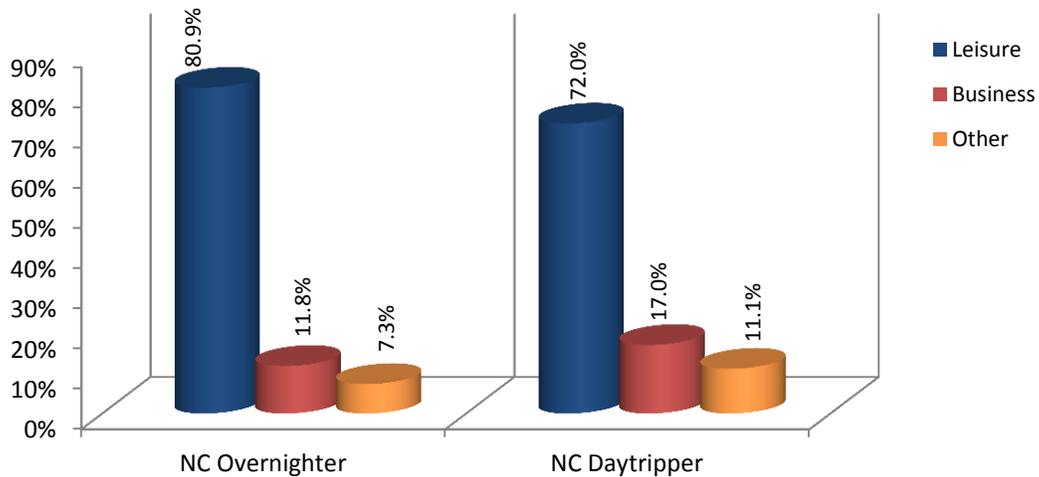


## 2013 Overnight vs. Daytrip Comparison

The following section provides comparisons and contrasts of North Carolina’s overnight and day visitors.

Though leisure is the predominant reason for travel to North Carolina for overnights and daytrippers, a slightly larger share of overnights to North Carolina travel to the state for leisure than daytrippers. The proportion of daytrippers who visit the state for business is larger than the proportion overnights for that purpose.

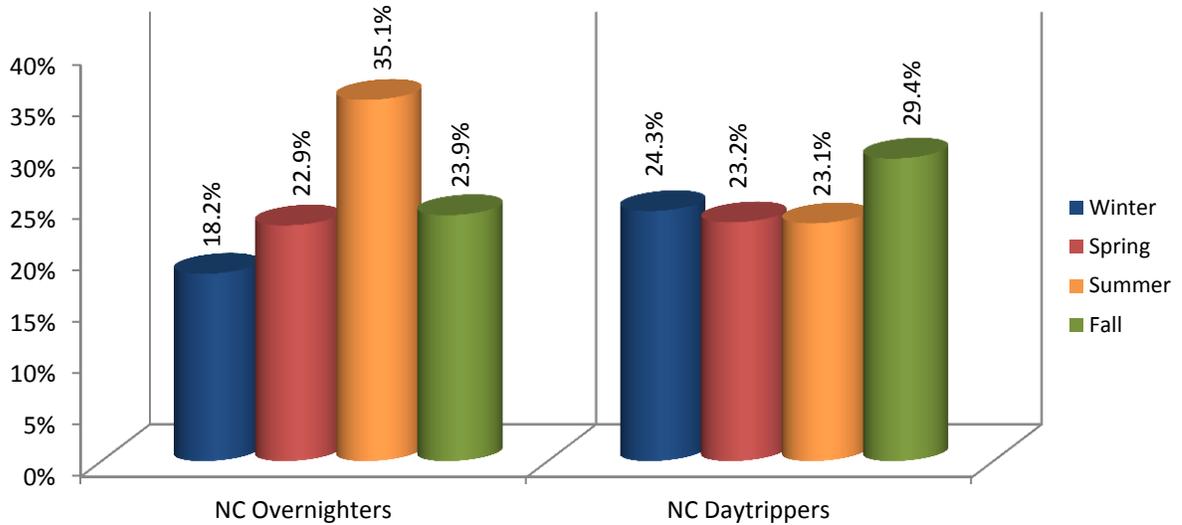
### 2013 Primary Purpose of Trip



## Travel Volume by Season

The seasonal distribution of visitors helps understand the flow of travelers through the state. Overnighters were more likely to visit during the summer, while daytrip seasonal distribution is more consistent throughout the year.

2013 Season of Travel



## Travel Party Size

North Carolina Overnighters	North Carolina Daytrippers
1.9 people	1.9 people

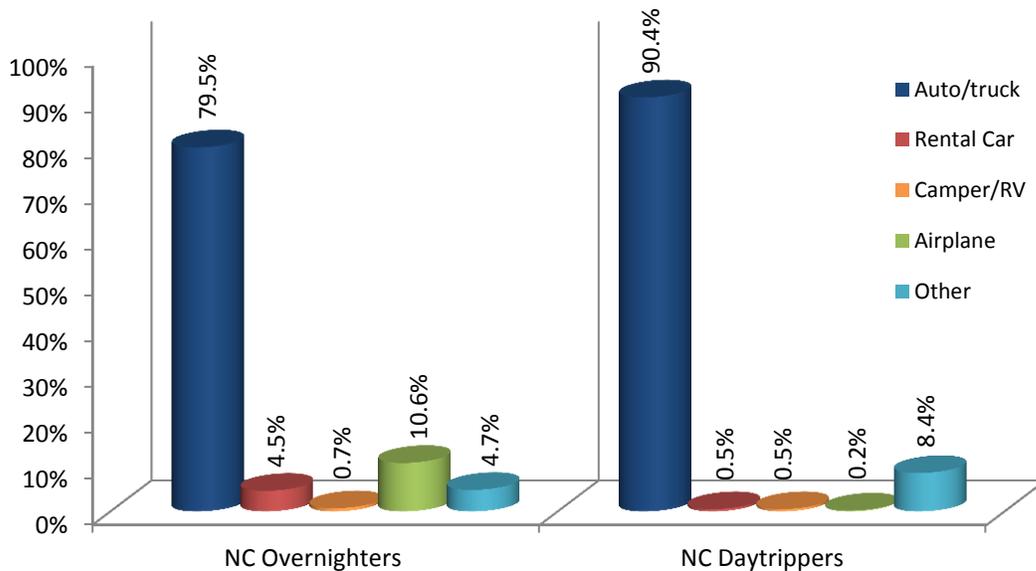
## Children on Trip

North Carolina Overnighters	North Carolina Daytrippers
23.2%	25.0%

## Mode of Transportation

Not surprisingly, auto transportation was the primary use of travel by all of North Carolina visitors, both overnights and daytrippers.

2013 Primary Transportation by Overnight Visitors



## Origin of Visitors

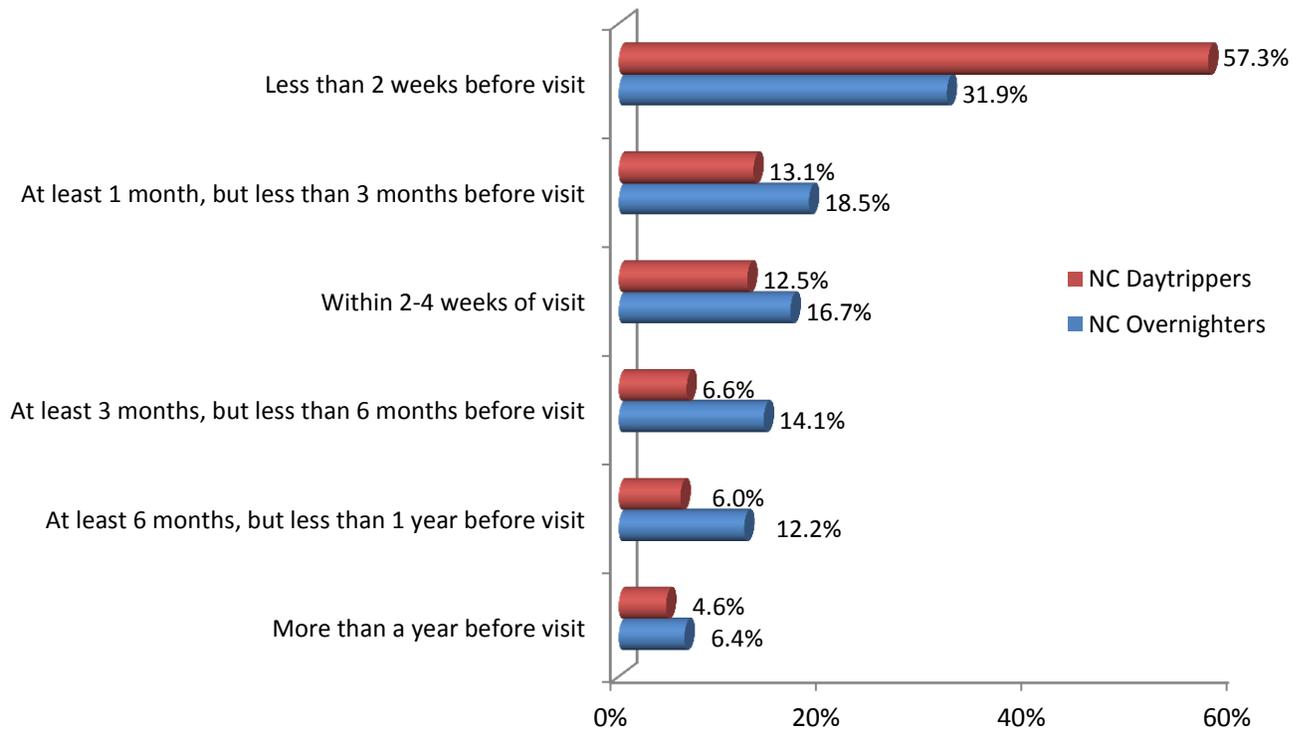
North Carolina is the top state of origin for both overnights and daytrippers to the state. In-state residents comprise nearly one-third of the state’s overnight visitors and just over one-half of the state’s daytrippers.

NC Overnighters	NC Daytrippers
North Carolina (30.4%)	North Carolina (56.0%)
South Carolina (8.4%)	South Carolina (13.3%)
Florida (7.5%)	Florida (5.2%)
Virginia (7.1%)	Georgia (3.5%)
Georgia (6.6%)	Virginia (3.0%)
Pennsylvania (4.7%)	Tennessee (2.7%)
New York (4.3%)	Pennsylvania (2.2%)
Texas (3.4%)	New Jersey (1.7%)
Ohio (2.9%)	Maryland (1.4%)
New Jersey (2.7%)	Texas (1.4%)
Tennessee (2.7%)	Ohio (1.3%)
Maryland (2.0%)	Illinois (0.9%)

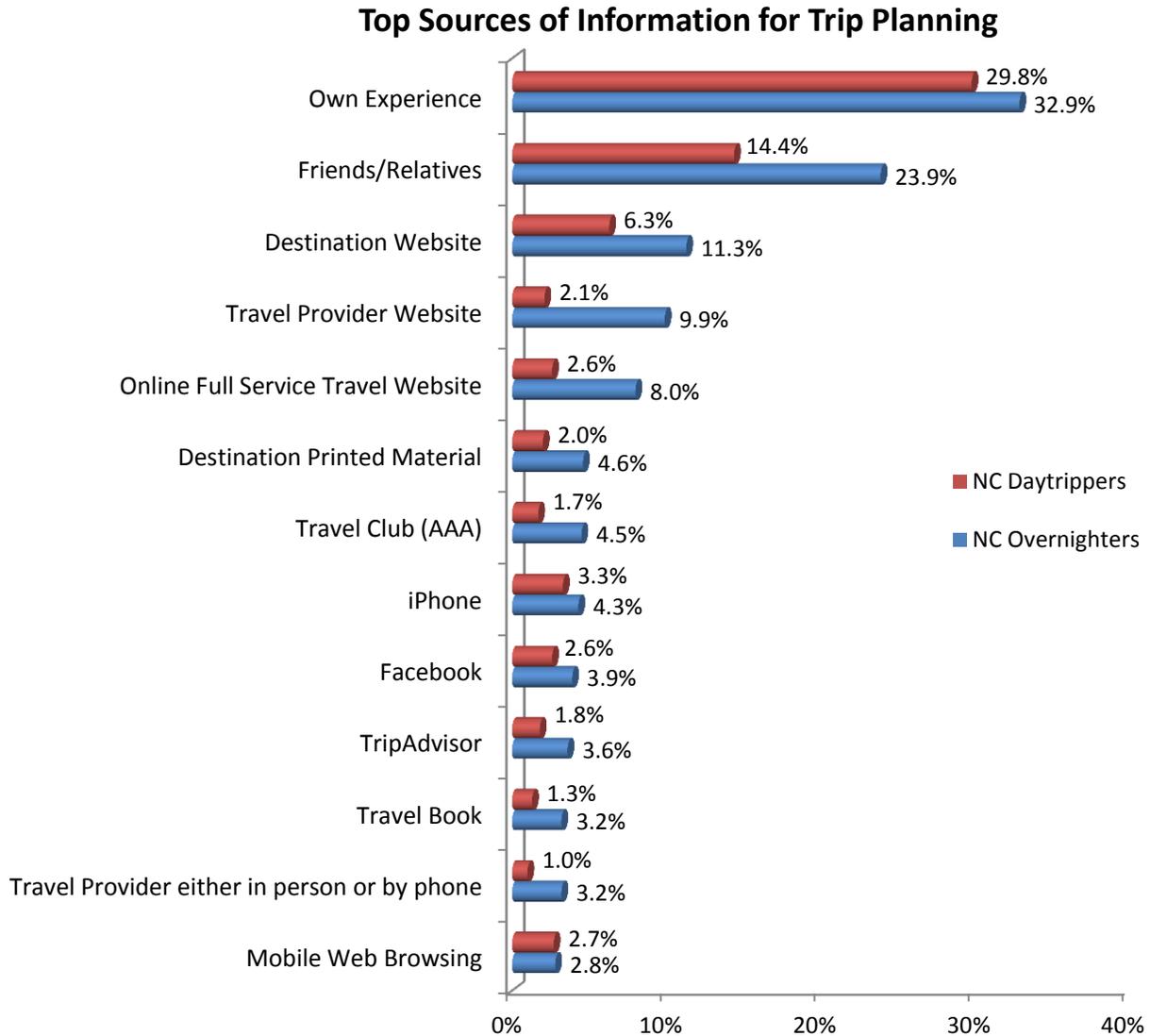
## Trip Planning

Daytrippers, not surprisingly, made the decision to visit North Carolina in a shorter time frame than overnights. Over half made the decision less than 2 weeks prior to the visit.

**How Far in Advance Decision Was Made to Visit North Carolina**



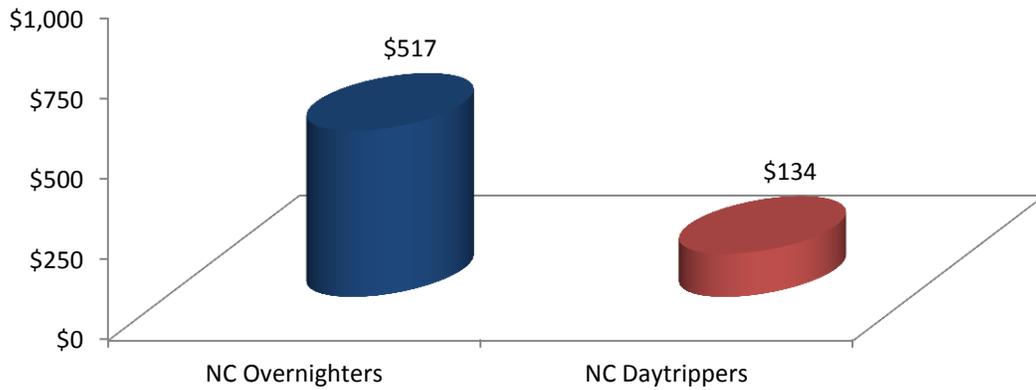
In trip planning, overnights to North Carolina relied on their own experience, friends/relatives and websites more than daytrippers.



## Trip Expenditures

2013 overnight visitor parties to and within North Carolina spend over \$380 more per trip than daytrippers.

**Average Total Trip Spending by  
Overnight and Daytrip Visitor Parties**



## Activities

Activities participated in by North Carolina travelers vary by their length of stay, but common activities between regions include visiting friends and relatives, shopping and sightseeing.

NC Overnigheters	NC Daytrippers
Visiting Relatives/Family Reunion (34.4%)	Visiting Relatives/Family Reunion (20.5%)
Shopping (22.2%)	Shopping (9.7%)
Visiting Friends (19.4%)	Rural Sightseeing (9.6%)
Beach (18.9%)	Visiting Friends (9.1%)
Rural Sightseeing (16.3%)	State/National Park (6.1%)
Fine Dining (14.8%)	Urban Sightseeing (5.3%)
Historic Sites/Churches (10.7%)	Fine Dining (5.0%)
State/National Park (10.7%)	Historic Sites/Churches (4.9%)
Urban Sightseeing (10.0%)	Beach (4.2%)
Museums (9.7%)	Wildlife Viewing (3.6%)
Old Homes/Mansions (6.5%)	Nature travel/Ecotouring (3.1%)
Wildlife Viewing (6.5%)	Casino/Gaming (3.1%)
Hiking/Backpacking (5.3%)	Museums (2.9%)
Gardens (5.0%)	Old Homes/Mansions (2.2%)
Nightclub/Dancing (4.4%)	Gardens (2.0%)
Nature travel/ecotouring (4.2%)	Art Galleries (2.0%)
Art Galleries (3.8%)	Hiking/Backpacking (1.6%)
Bird Watching (3.7%)	Bird Watching (1.6%)
Fishing (3.5%)	Special Events/Festivals (1.2%)
Casino/Gaming (3.3%)	Wine tasting/Winery tour (1.2%)
Special Events/Festivals (3.2%)	Theme Park (1.2%)
Wine tasting/Winery tour (3.2%)	Biking (1.0%)
Golf (3.0%)	Theater/Drama (1.0%)
Theme Park (2.7%)	Musical Theater (1.0%)
Biking (2.4%)	Nightclub/Dancing (0.9%)
Theater/Drama (2.1%)	Fishing (0.9%)
Craft Breweries (2.0%)	Golf (0.9%)
Spa/Health Club (2.0%)	Symphony/Opera/Concert (0.9%)
Musical Theater (1.9%)	Whitewater Rafting/Kayaking/Canoeing (0.9%)
Zoos (1.7%)	Hunting (0.8%)
Motorboat/Jet Ski (1.4%)	Zoos (0.7%)
Whitewater Rafting/Kayaking/Canoeing (1.4%)	Horseback Riding (0.7%)
Youth/amateur/collegiate sporting events (1.4%)	Major Sport Event (0.7%)

## Demographic Profile for North Carolina Visitors

	North Carolina Overnighters	North Carolina Daytrippers
<b>Average age of household head</b>	47.9 years of age	47.8 years of age
<b>Education of Household Head</b>		
High school or less	12.7%	20.6%
Some college - no degree	21.5%	24.9%
Completed college	44.1%	40.3%
Post Graduate College	21.7%	14.3%
<b>Annual Household Income</b>		
Less than \$25,000	16.0%	27.4%
\$25,000-\$49,999	22.9%	29.5%
\$50,000-\$74,999	21.0%	19.0%
\$75,000 & over	40.1%	24.2%
<b>Average Annual Income</b>	\$74,438	\$53,531
<b>Marital Status</b>		
Married	57.5%	54.2%
Never married	20.1%	18.7%
Divorced, widowed, separated	22.4%	27.0%
<b>Ethnicity</b>		
White	83.3%	83.4%
Black/African American	11.1%	12.2%
Asian or Pacific Islander	2.1%	0.9%
Other	3.5%	3.5%
<b>Average Number of Vacation Days per Year</b>	10.7	9.3

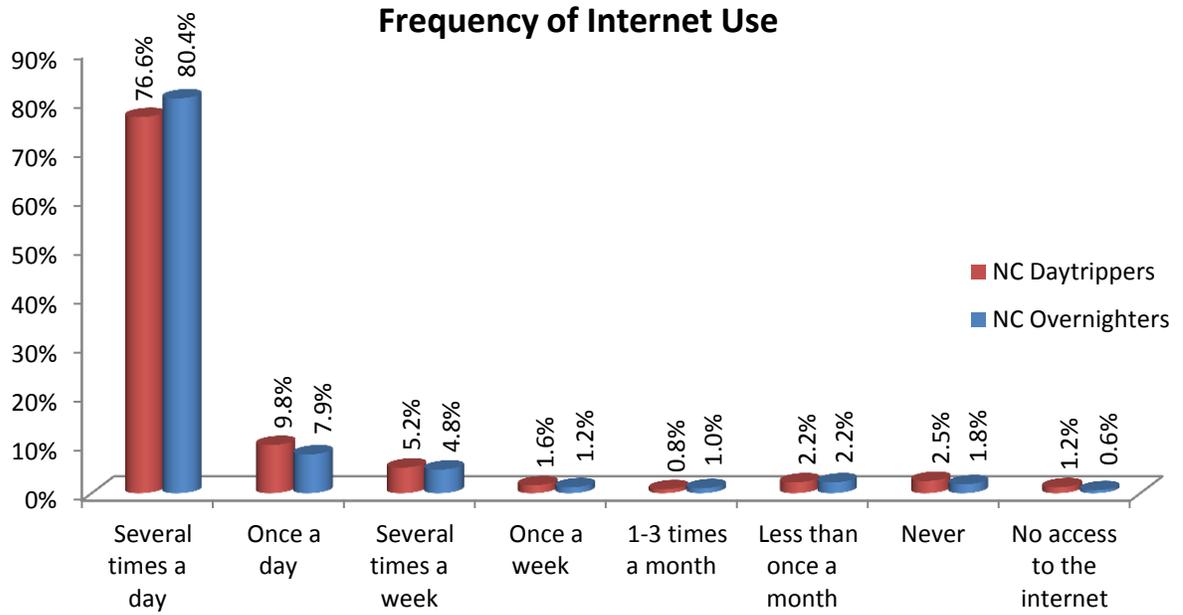
## 2013 Top Advertising Markets

The top ten advertising markets for the overnights and daytrippers very similar, but differences can be noted in the ranks. Raleigh-Durham is the primary market for overnights while Charlotte narrowly edged Raleigh-Durham as the top DMA for daytrippers within the state.

<b>NC Overnights</b>	<b>NC Daytrippers</b>
Raleigh-Durham-Fayetteville (13.0%)	Charlotte (22.1%)
Charlotte (9.0%)	Raleigh-Durham-Fayetteville (21.9%)
Greensboro-High Point-Winston Salem (6.3%)	Greensboro-High Point-Winston Salem (15.8%)
Atlanta (5.3%)	Greenville-Spartanburg-Asheville (10.4%)
Greenville-Spartanburg-Asheville (4.5%)	Greenville-New Bern-Washington (9.3%)
New York (4.2%)	Wilmington (3.8%)
Washington, DC (Hagerstown, MD) (4.0%)	Columbia (2.5%)
Greenville-New Bern-Washington (3.5%)	Atlanta (2.3%)
Wilmington (2.4%)	Norfolk-Portsmouth-Newport News (2.2%)
Norfolk-Portsmouth-Newport News (2.3%)	Tri-Cities, TN-VA (1.7%)
Columbia (2.2%)	Roanoke-Lynchburg (1.6%)
Philadelphia (2.0%)	Knoxville (0.9%)
Orlando-Daytona Beach-Melbourne (1.7%)	Tampa-St. Petersburg-Sarasota (0.6%)
Tampa-St. Petersburg-Sarasota (1.7%)	Richmond-Petersburg (0.6%)
Richmond-Petersburg (1.6%)	Nashville (0.6%)
Roanoke-Lynchburg (1.6%)	Philadelphia (0.5%)
Pittsburgh (1.3%)	Chattanooga (0.5%)
Tri-Cities, TN-VA (1.3%)	Myrtle Beach-Florence (0.4%)
Chicago (1.3%)	Charleston, SC (0.3%)

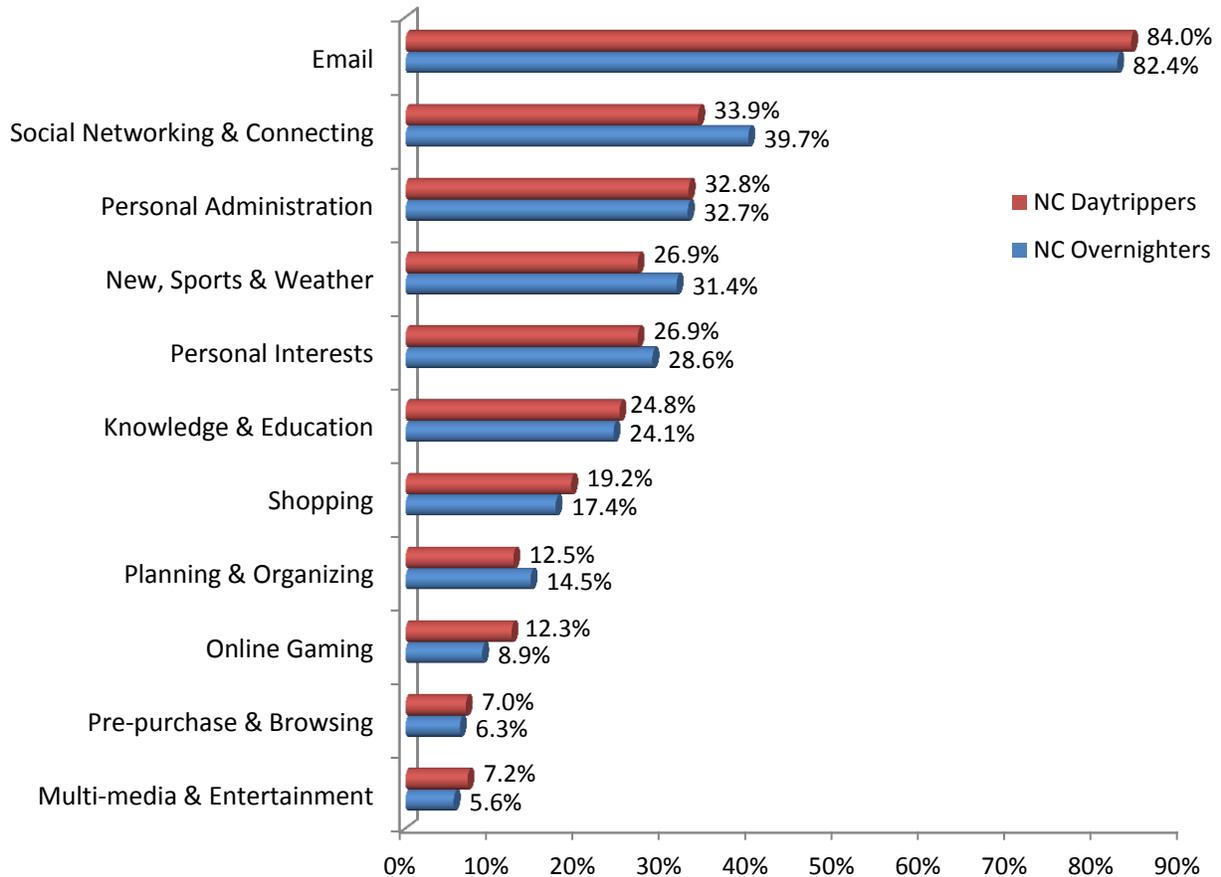
Note: Advertising markets defined by Nielsen's Designated Market Area (DMA)

## Importance of Internet



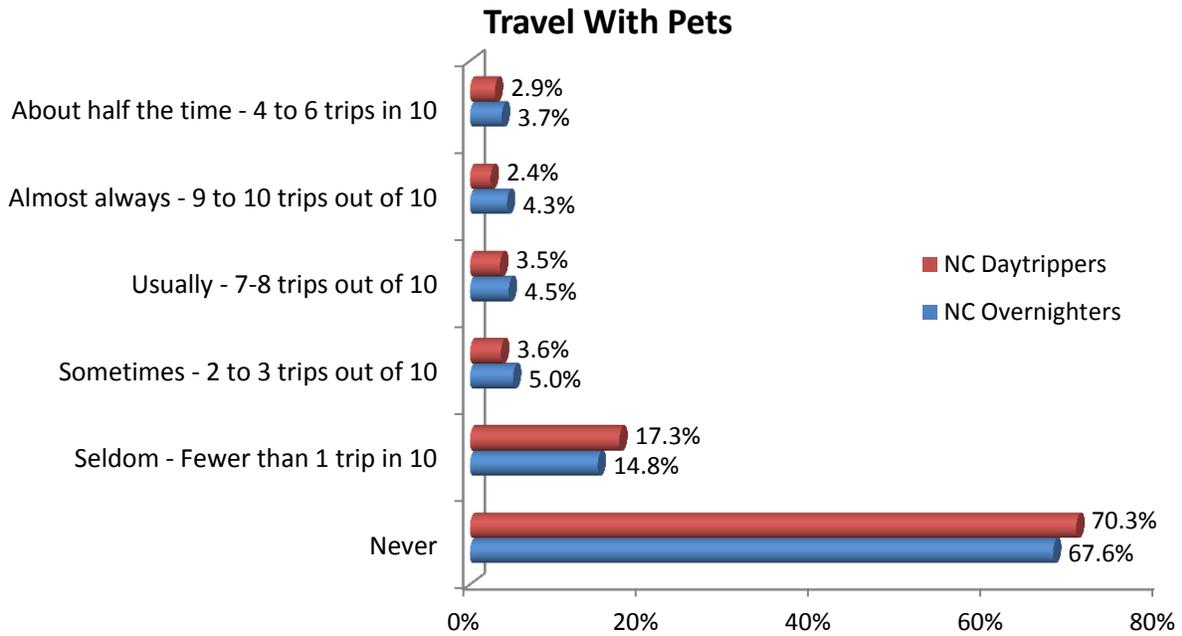
Overnighters and daytrippers to North Carolina place similar importance to various online activities. Email ranks top for both types of travelers. Overnighters ranked social networking slightly higher, while daytrippers ranked planning and organizing activities higher than overnighters.

### Online Activities Ranked by Importance



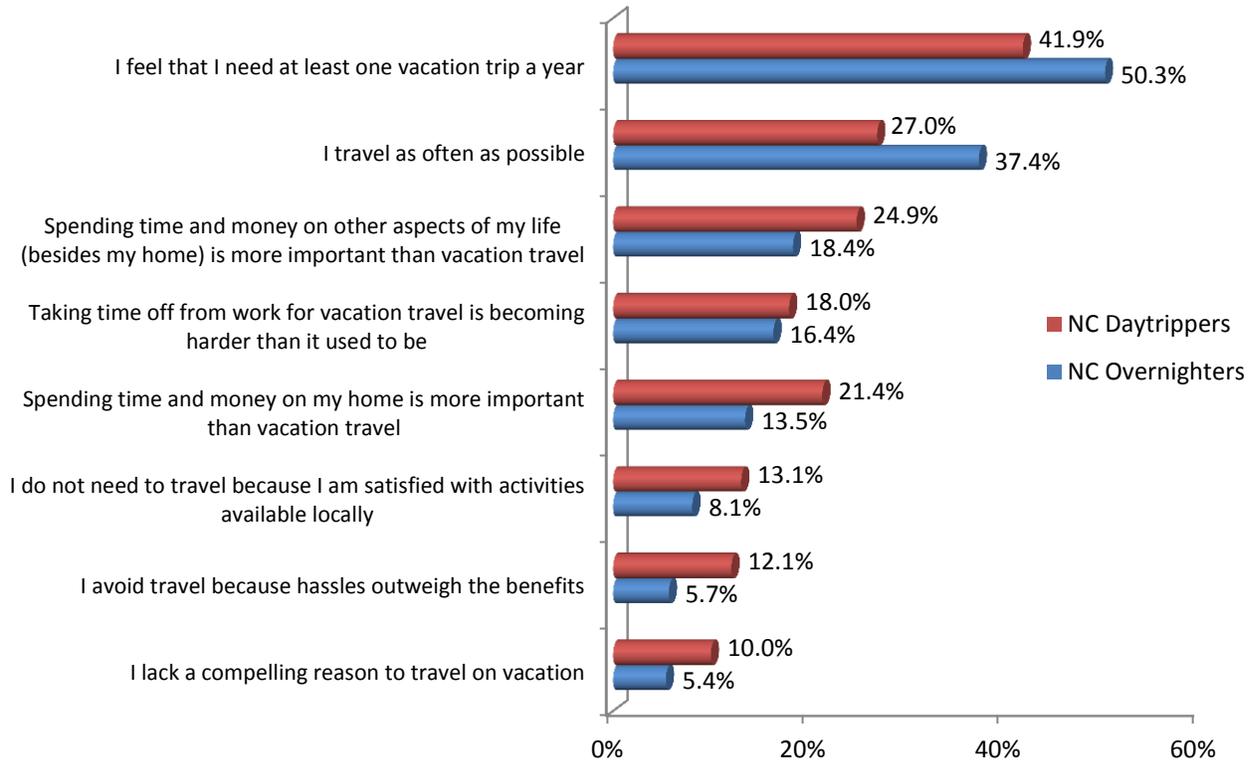
## Vacation Attitudes

The majority of North Carolina visitors, both overnigheters and daytrippers, do not travel with pets. Those who do, do so only seldom.

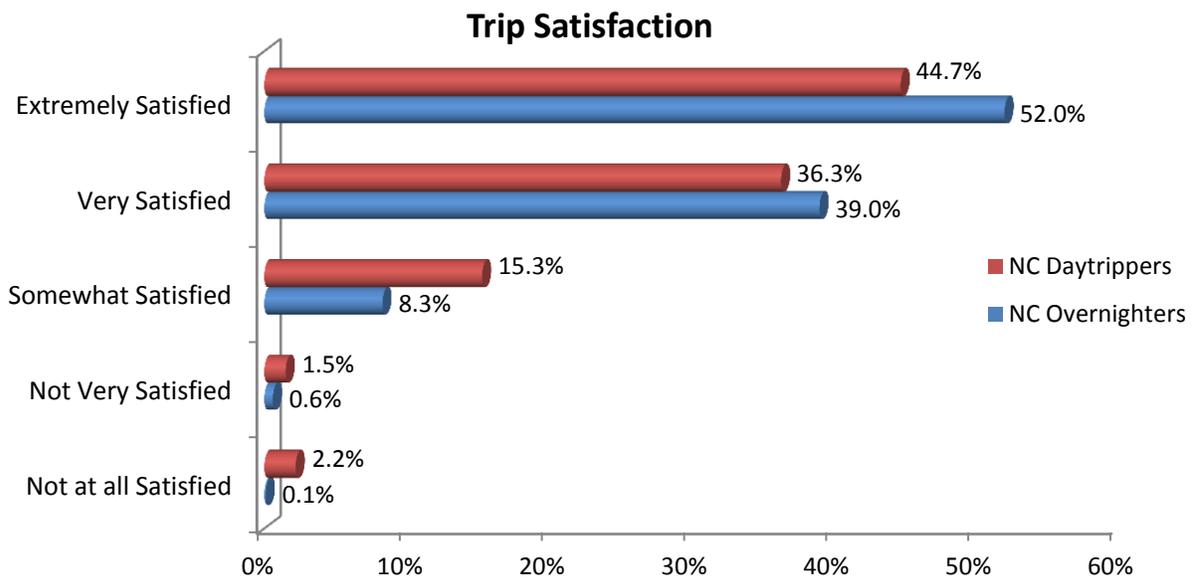


Not surprisingly, a larger proportion of overnights feel the need for a vacation at least once a year than daytrippers, though nearly half of daytrippers need vacation as well.

### Current Feelings Concerning Vacation Travel



### Trip Satisfaction



## 2013 North Carolina Regional Travel Summary

### Glossary of Terms

Travel	A trip over 50 miles one-way from home <i>or</i> any night away from home
Overnight Visitor	A visitor who spent at least one night away from home during travel
Daytripper	A visitor who did not spend any nights away from home, but traveled at least 50 miles one-way from home
Designated Market Area	Also referred to as a DMA and is a term used by Nielsen Media Research to identify an exclusive geographic area of counties in which the home market television stations hold a dominance of total hours viewed. There are 210 DMA's in the U.S.